Version	**:**	3.60
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Website	**:**	http://www.kayako.com
Forums	**:**	http://forums.kayako.com
Members' area	**:**	https://members.kayako.com

Kayako SupportSuite

User Manual

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About this manual

This version of the manual can be used as a guide for many other preceding and proceeding versions of Kayako SupportSuite, LiveResponse and eSupport. However, please note that feature discrepancies may exist between versions.

We publish a new and up to date manual upon the release of each stable build. For accuracy, be sure to use the manual(s) bundled with your downloaded SupportSuite, LiveResponse or eSupport package.

If you would like to send in a suggestion or report any errors in this manual, please send an e-mail to docs@kayako.com or post in the documentation forum - your input is very much appreciated.

Please do **not** use this address for support.

You can obtain further support for any of Kayako's products via:

- **Members' area –** https://members.kayako.net
- **Community forums** – http://forums.kayako.com

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Using this manual

The staff control panel section of the manual covers every aspect of using the control panel as a staff user.

The administrator control panel section of this manual covers each area of the SupportSuite, eSupport and LiveResponse system and provides detailed explanations of the internals of the systems and how to configure them.

This manual is split into six main sections:

- Installation guide
  - A guide to the installation procedure for SupportSuite, eSupport and LiveResponse.
- Staff control panel user guide
  - A guide to the use of and the features of SupportSuite, eSupport and LiveResponse. Most of the functionality aspects and practical use of using the system is documented in this section.
- Administrator control panel user guide
  - A guide to the use of the administrator control panel, covering mainly configuration and setting aspects of the SupportSuite, eSupport and LiveResponse. This section of the manual also describes the processes and systems of SupportSuite, eSupport and LiveResponse.
- PDA interface to the staff control panel guide
  - A guide to using the for-PDA interface to the staff control panel.
- Kayako SMS gateway
  - Information about the Kayako SMS gateway, and how it is integrated into SupportSuite, eSupport and LiveResponse.
- Frequently asked questions
  - A section of commonly asked questions and their answers.

For example, if you want to find out how to reply to a ticket, you would typically go to the **Ticket handling** section of the staff control panel user manual (see ticket handling in the staff control panel).

However, if you wanted to find out how the system handles incoming tickets from the mail parser then you would typically go to the **Mail** parser section of the administrator control panel manual (see mail parser in the administrator control panel manual).

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Installation, upgrading, importing and system configuration

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System requirements

Please visit http://www.kayako.com/solutions/system-requirements.php to view the system requirements for our products.

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Installation

This procedure outlines all of the steps necessary for you to perform a brand new installation of SupportSuite, eSupport or LiveResponse. In this guide, we are installing the product **SupportSuite**. However, all of the steps are equally applicable to eSupport or LiveResponse.

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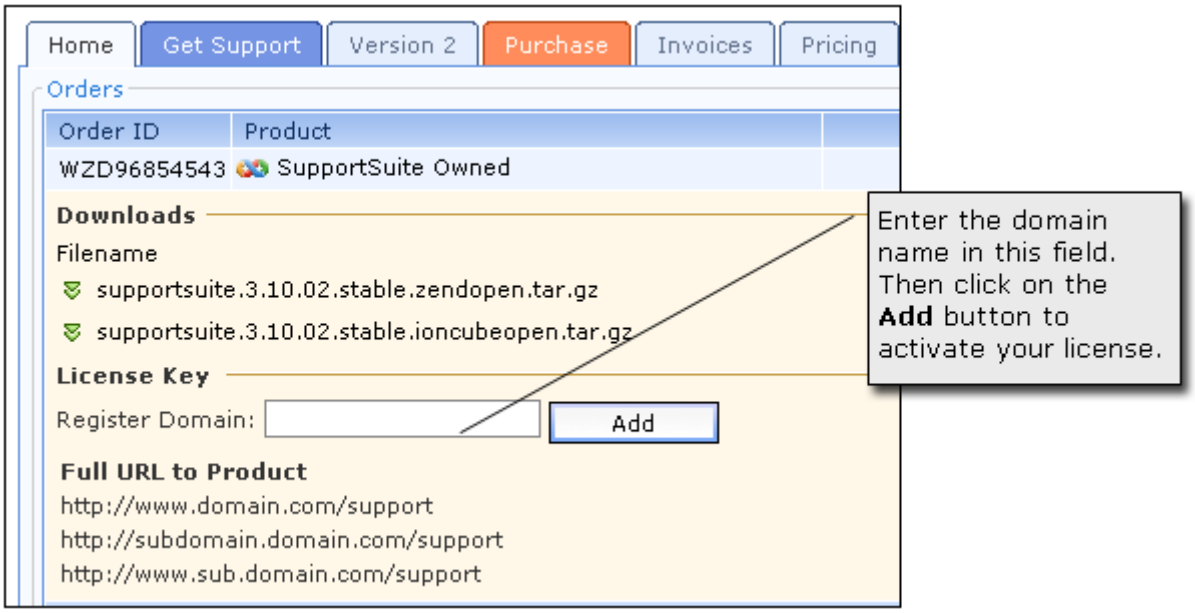
Step one: Activating your license and downloading the key file

This guide assumes that your SupportSuite, eSupport or LiveResponse license (owned, yearly or leased) has already been purchased.

The first task before proceeding with the installation of SupportSuite, eSupport or LiveResponse is to activate the license for your domain name. A license for SupportSuite, eSupport and LiveResponse is unique and can be used only on the domain name you activate the license with.

Activation of a license takes place in the Kayako member's area, located at http://members.kayako.com.

After logging in with your customer e-mail address and password, you will be presented with a page that looks similar to the figure shown below.



To activate the license for your domain name you must enter the domain in the **Register Domain** field, as indicated to above.

Please note the following examples. If you enter your domain incorrectly you will not be able to change it - you will have to contact us to have it rectified.

If you plan on installing SupportSuite, eSupport or LiveResponse to:

- www.mydomain.com/supportdesk
  - The domain you must register here is **mydomain.com**
- www.mydomain.com/customers/support
  - The domain you must register here is **mydomain.com**
- http://support.mydomain.com
  - The domain you must register here is **support.mydomain.com**
- http://support.mydomain.com/support
  - The domain you must register here is **support.mydomain.com**

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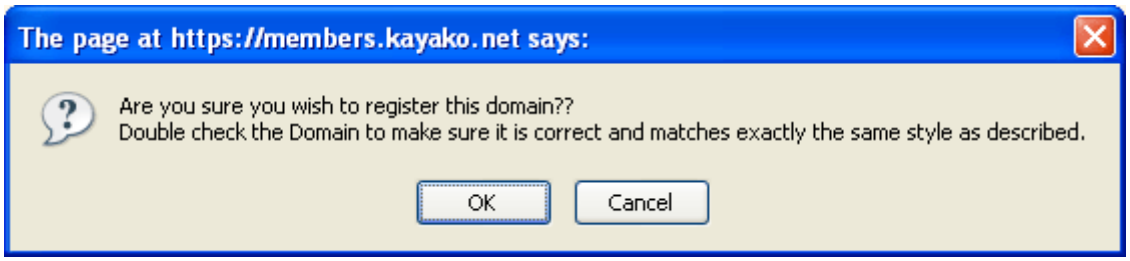
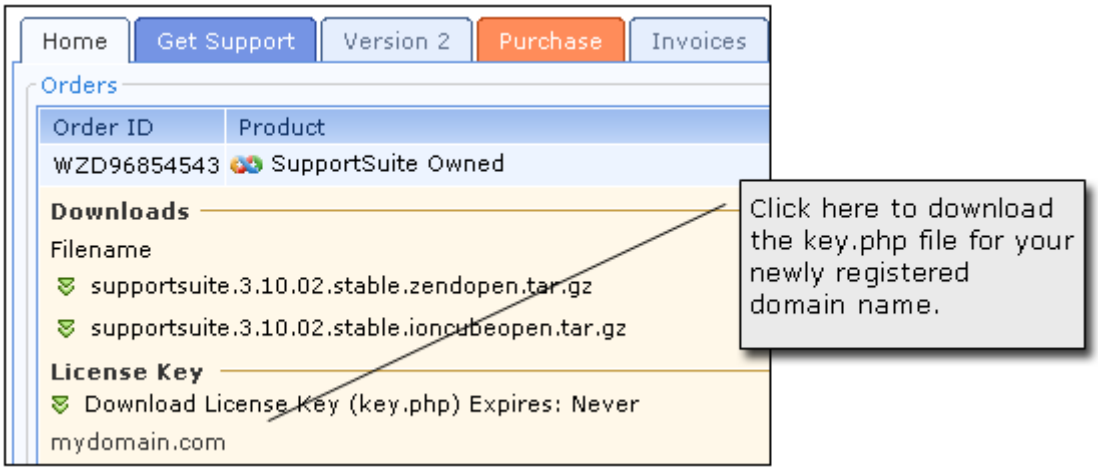
- http://clients.support.mydomain.com/
  - The domain you must register here is **clients.support.mydomain.com**
- http://82.133.21.88/support
  - The domain you must register here is **82.133.21.88**
- http://localhost:8888
  - The domain you must register here is **localhost**

If you have any doubts as to what you must enter in order to activate your license, please contact support (see support resources).

Click on the **Add** button to register the domain. You will be asked to confirm your entry, as shown below.


The page at https://members.kayako.net says:
Are you sure you wish to register this domain??
Double check the Domain to make sure it is correct and matches exactly the same style as described.
OK
Cancel

Click on the **OK** button to confirm your entry. The page will then refresh, and you should see your **key.php** file for the domain you had just entered, as shown below.



As indicated above, click on the **Download** link to download the key.php file. Save this to a location on your hard disk drive – you will need to upload this file later on.

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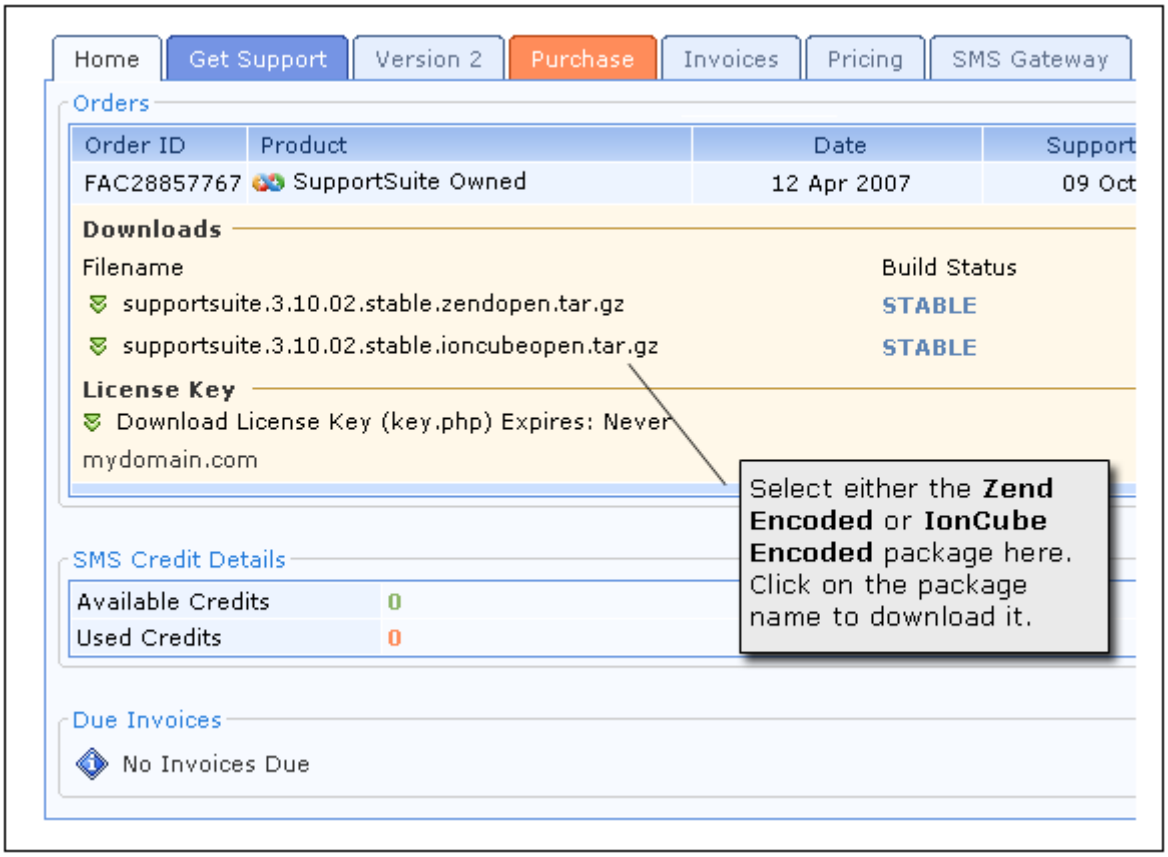
Step two: Downloading the package

The latest package can be downloaded from your Kayako members area, available at http://members.kayako.com.

After logging in with your customer e-mail address and password, you will be presented with a page that looks similar to the figure shown below.



The example here shows the available package downloads for **SupportSuite** version **3.10.02**. The file names of these packages will depend on the product you have purchased and what the current stable version is.

To download and save a package to your hard disk drive, click on the package name (as indicated above).

Zend or IonCube?

Before selecting the package to download, you must decide whether you want to use the **Zend Encoded** version or the **IonCube Encoded** version of the software. You must check with your host or system administrator as to which you should use.

For most standard web hosting accounts, it is usual that Zend Optimizer is installed which would mean that you are able to use the **Zend Encoded** version. To find out whether or not Zend Optimizer has been installed on your server:

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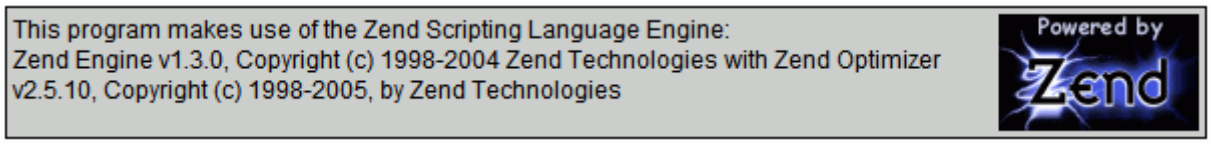
1. Create a new PHP file called phpinfo.php. Once created, type the following code in it exactly as it appears below and save it to a directory.

   <?php phpinfo(); ?>

2. Upload this file to a World Wide Web accessible location and navigate to it.

3. You should then see detailed output of your current PHP environment.

4. To tell if Zend Optimizer is installed from this page, scroll down until you find something similar to the figure below.


This program makes use of the Zend Scripting Language Engine:
Zend Engine v1.3.0, Copyright (c) 1998-2004 Zend Technologies with Zend Optimizer
v2.5.10, Copyright (c) 1998-2005, by Zend Technologies
Powered by
Zend

5. If Zend Optimizer is installed on your server, it will be listed here (as shown above).

For more information on the freely available Zend Optimizer, see www.zend.com/products/zend_optimizer.

If you do not have Zend Optimizer installed, you may be able to use the IonCube Dynamic Loaders that normally require no server installation and is simply a case of uploading additional files to your server. The loaders can be downloaded from www.ioncube.com/loaders.php, and need to be placed in a folder called **/ioncube/** in the directory your software is to be installed.

You can only use the IonCube Dynamic Loaders if you have **safe_mode** set to **Off** and **enable_dl** set to **On** in your PHP configuration (php.ini). If you do not have the correct settings in order to use the IonCube Dynamic Loaders, please contact your system administrator asking that they either change the settings as appropriate, or make IonCube available server-wide.

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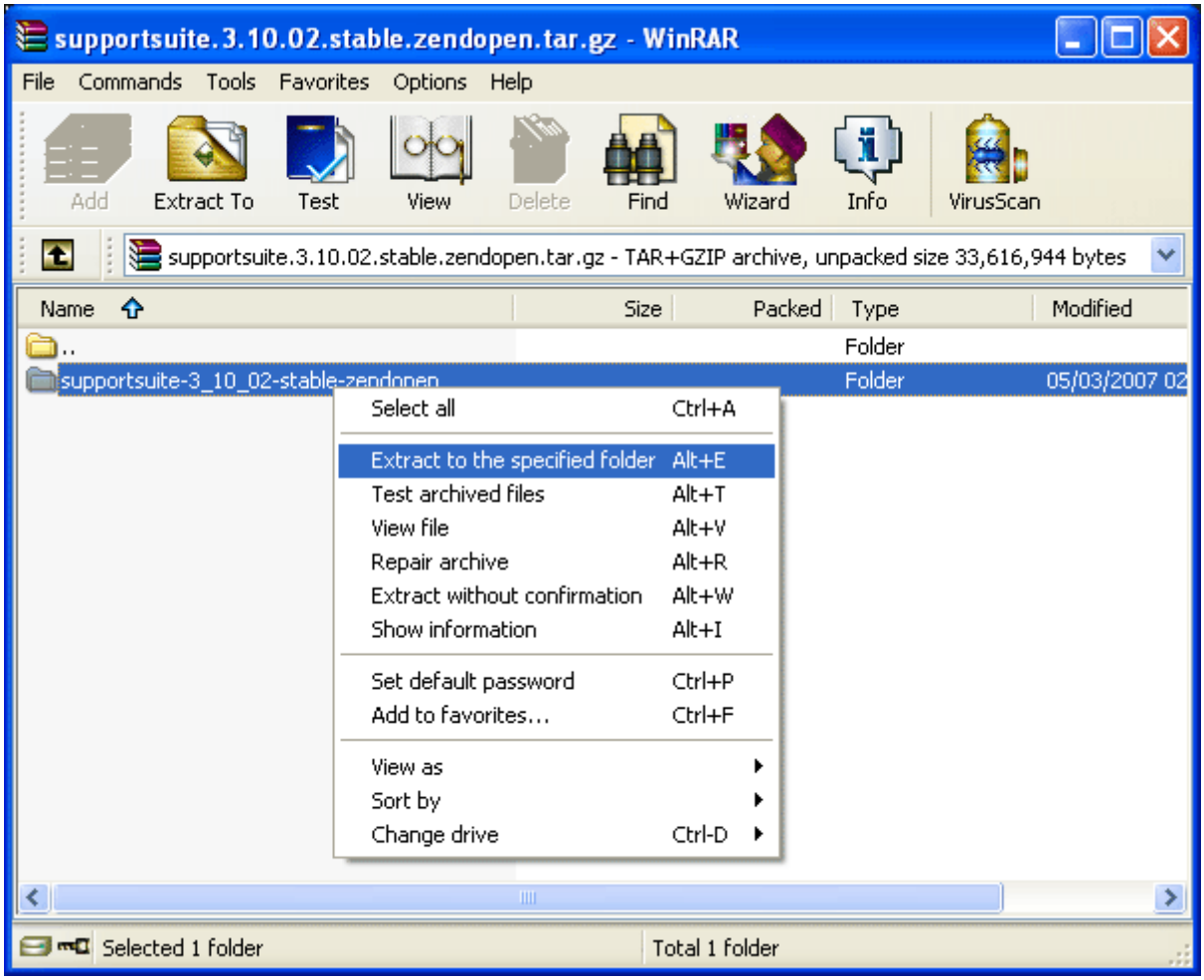
Step three: Extracting the package

For this part of the installation guide, we will assume that you have downloaded the package and saved it to this location: **C:\Documents and Settings\User\Desktop\Kayako Files**

Using an archiver program such as WinRAR (as demonstrated below), extract contents of the archive into a folder on your hard disk drive (in this case, we will extract the files to the same folder the archive is located in - **C:\Documents and Settings\User\Desktop\Kayako Files**).


supportsuite.3.10.02.stable.zendopen.tar.gz - WinRAR
File Commands Tools Favorites Options Help
Add Extract To Test View Delete Find Wizard Info VirusScan
supportsuite.3.10.02.stable.zendopen.tar.gz - TAR+GZIP archive, unpacked size 33,616,944 bytes
Name Size Packed Type Modified
.. Folder
supportsuite-3_10_02-stable-zendopen Folder 05/03/2007 02
Select all Ctrl+A
Extract to the specified folder Alt+E
Test archived files Alt+T
View file Alt+V
Repair archive Alt+R
Extract without confirmation Alt+W
Show information Alt+I
Set default password Ctrl+P
Add to favorites... Ctrl+F
View as
Sort by
Change drive Ctrl-D
Selected 1 folder
Total 1 folder

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Step four: Setting up the database

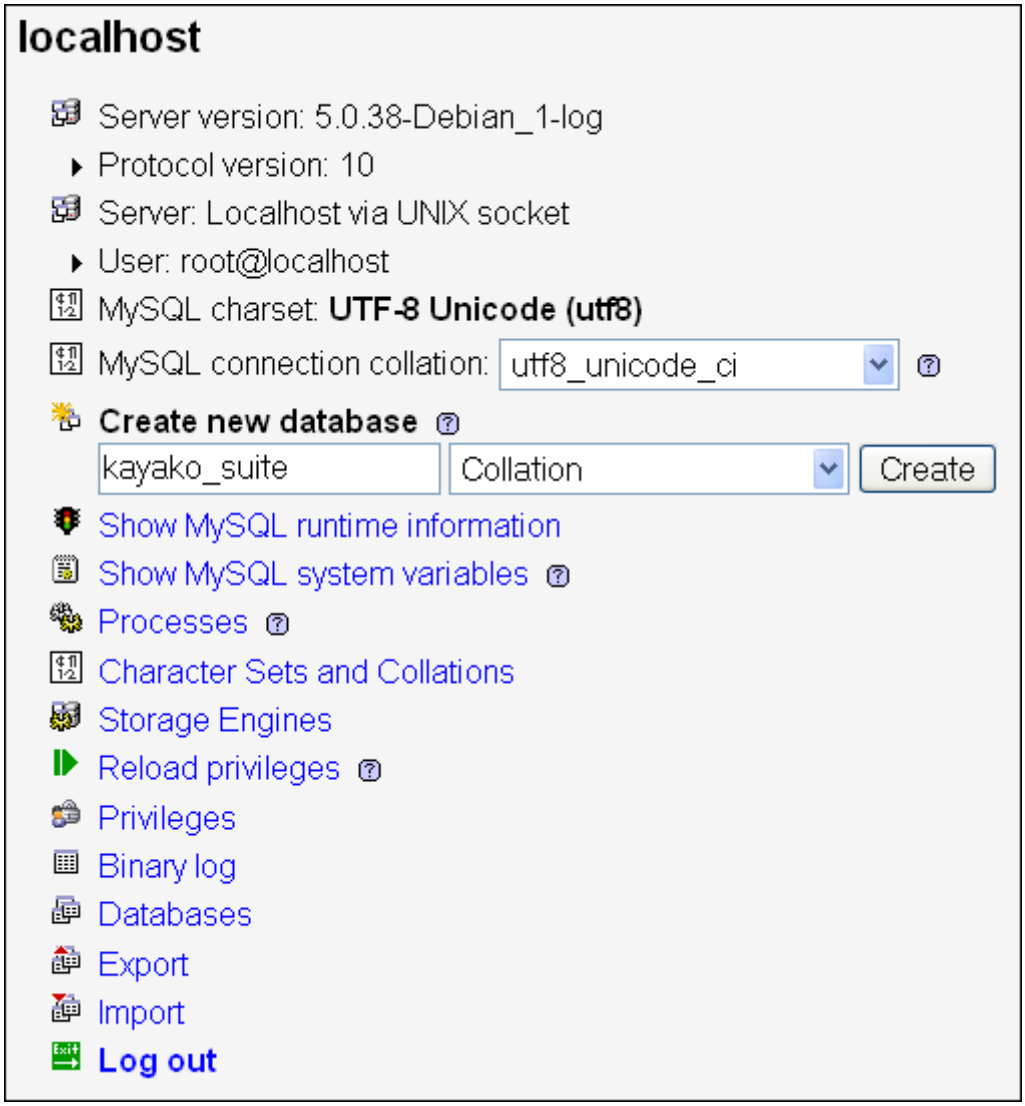
Kayako SupportSuite, eSupport and LiveResponse require a MySQL database to be available and accessible before the installation script is run. It is recommended that an individual database be created for the exclusive use of the software.

Using phpMyAdmin

Versions of phpMyAdmin are updated and released frequently, and quite often the cosmetics and layout of the interface may change.

1. Login to phpMyAdmin to create a new database (in this guide, we will name the database **kayako_suite**).

2. Under **Create New Database**, enter the name of the new database.



3. Click on the **Create** button to create the database.

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4. If successful, you will receive the following success message.

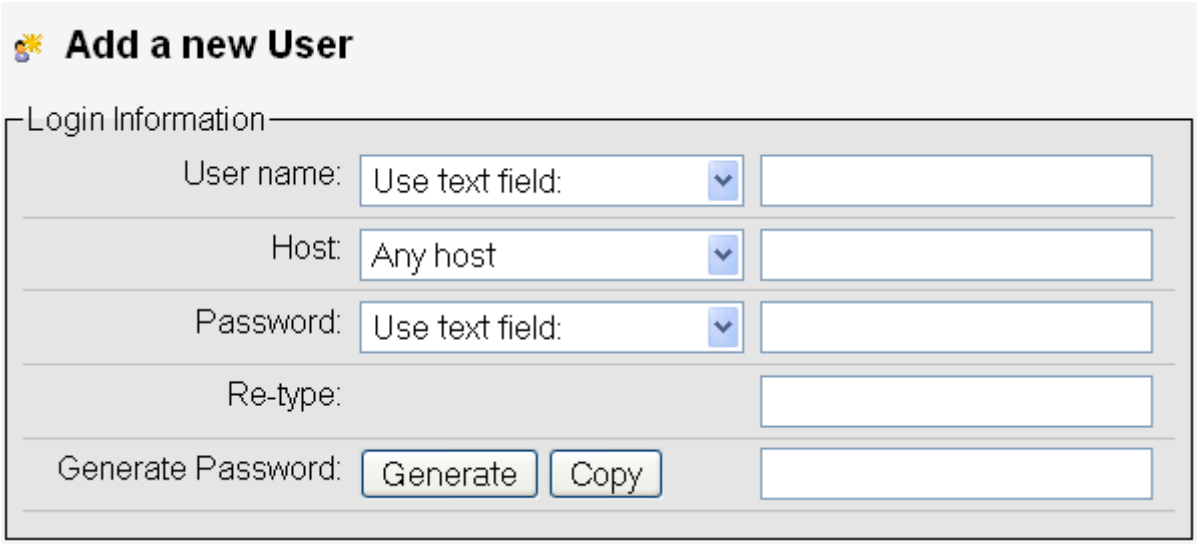
5. Click on the **Home** icon, as shown below.

6. Find and click on the **Privileges** link.

7. Click on the **Add New User** link, as shown below.

8. Select a **username** and **password** for this user and remember the details – these will be used at a later stage. It is recommended that you name the database user the same as the Kayako product database for consistency.

9. It is recommended that you set the **Host** to **localhost** – meaning that the only host with permissions to connect to this database is your web server, and no external users.



10. Scroll down to the bottom of the page and click on the **Go** button to add the new user.

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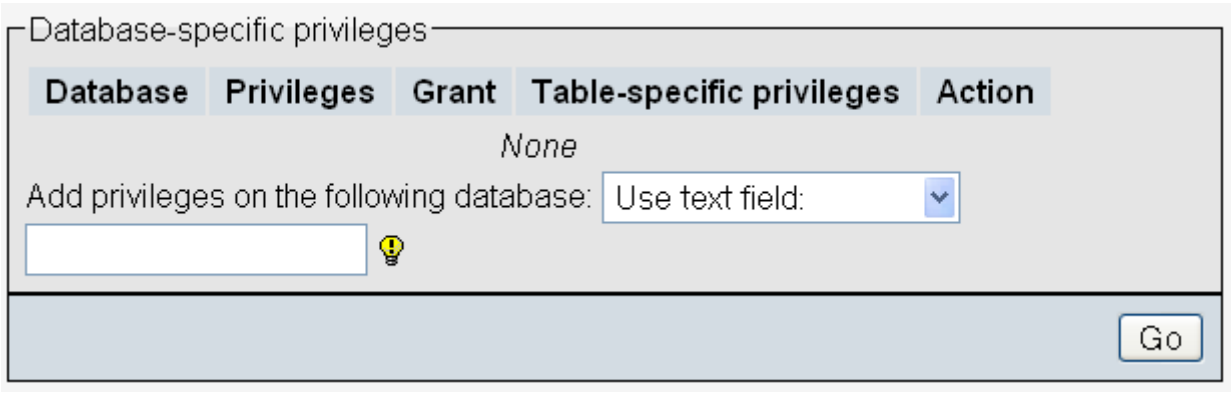
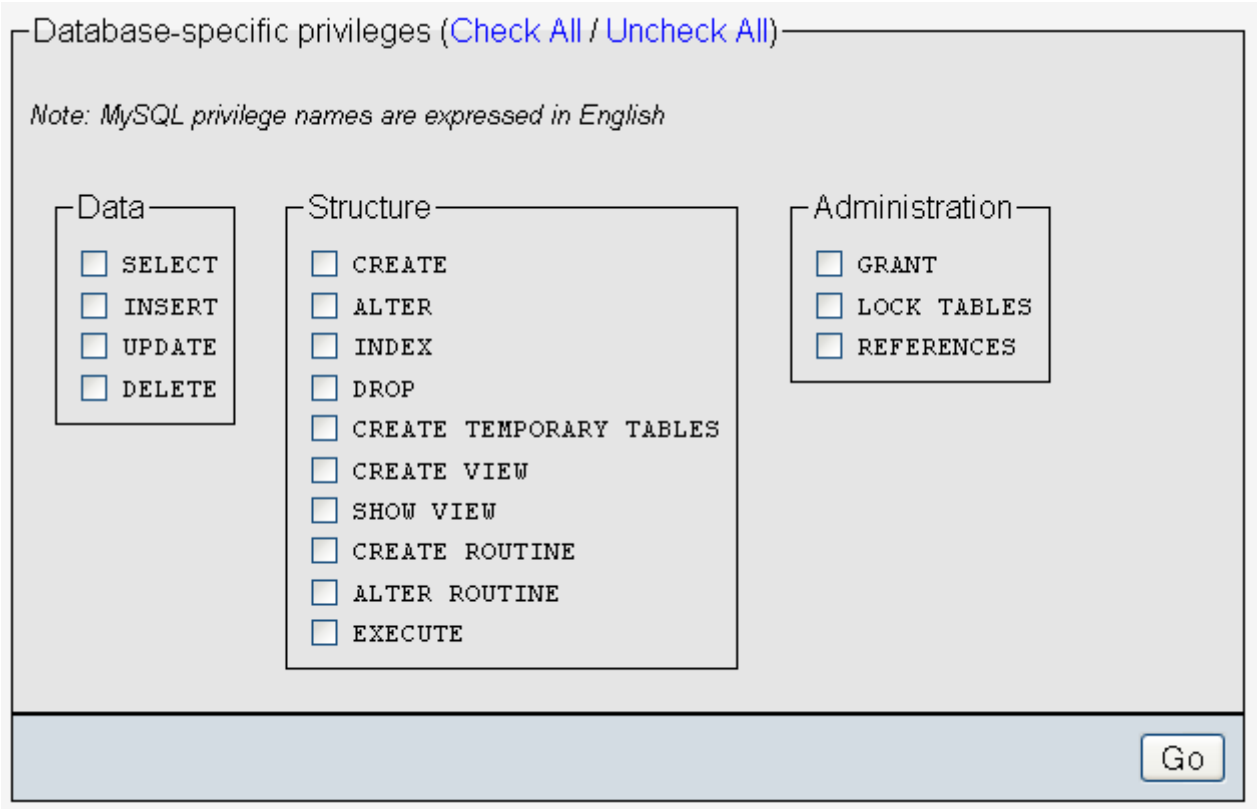
11. Now, this new MySQL user needs to be given permissions to access the database we created earlier (named **kayako_suite**).

12. On the same page (to which you were taken after adding the user), scroll down to **Database-specific Privileges**, as shown below.



13. Using the drop down menu, select the newly created database (**kayako_suite**).

14. You will be taken to a permissions set up page, as shown below.



15. Ensure that the database user is given **all** database permissions (click on the **Check All** link).

16. Click on the **Go** button to save the database user's privileges.

You have no created a new database and assigned a new user to this database. You should have the following information recorded:

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- Database name
- Database user's username
- Database user's password

Using the MySQL CLI command line interface

Login to your MySQL Command Line Interface using the root access account in order to create a new database and create a new database user.

1. First, you need to login to the MySQL console interface. Once logged in, you should have something similar the following output:
    - > mysql -u root –p
      Enter Password: [Enter your root password here]
2. Assuming the database name is **kayako_suite,** the database user as **kayako_suite**, the host as **localhost** and the password as **support**, enter the following commands:
    - create database kayako_suite;
    - GRANT ALL PRIVILEGES ON kayako_suite.* TO kayako_user@"%" IDENTIFIED BY 'support';
    - exit
3. Your database and database user should now have been created and set up with the correct permissions.

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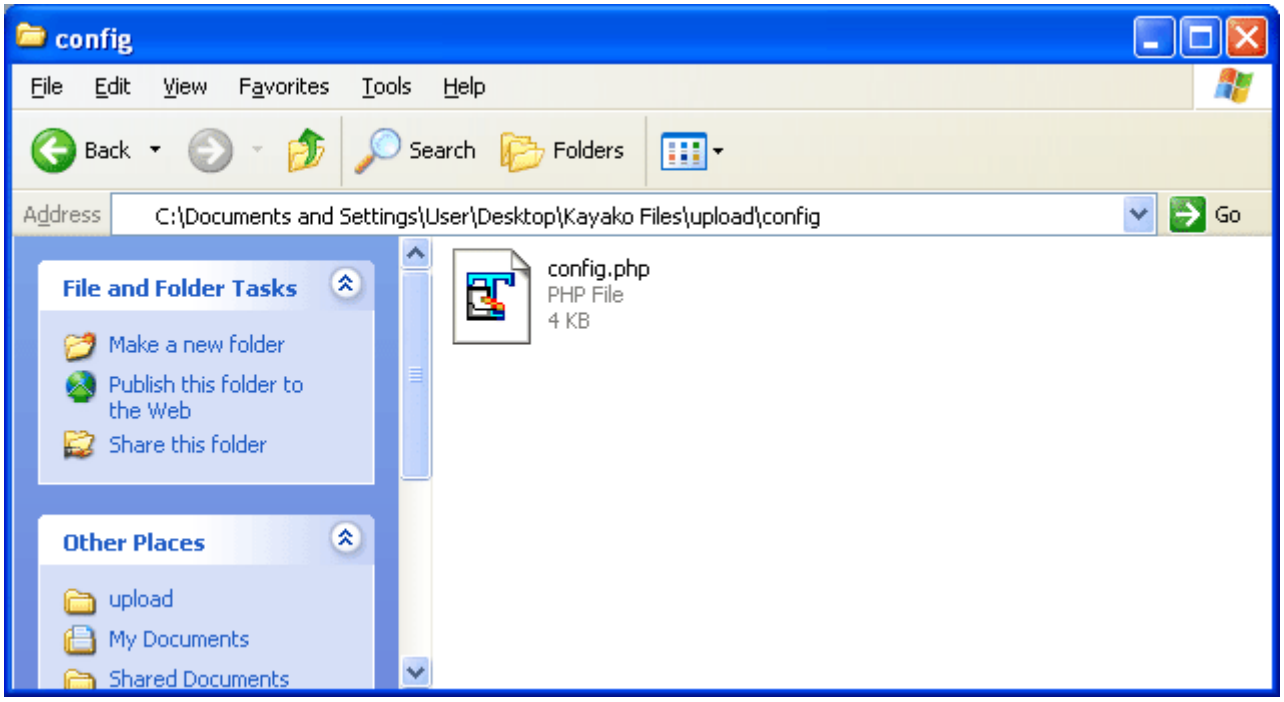
Step five: Editing the config.php file

The **config.php** file that can be found in the folder **/upload/config/** (relative to the location to which you extracted the software package in step three). This file needs to be manually edited and must have the database and login information for the database that you wish to install SupportSuite, eSupport or LiveResponse to.

To edit the config.php file:

1. Browse to the location to which you extracted the package files.
2. Browse to the **upload** folder.
3. Browse to the **config** folder.



4. Open up **config.php** in a text editor (such as WordPad, Edit+ etc.). In this example, we will open the file using Microsoft WordPad, which preserves line breaks well.
    a. We do not recommend that you use Microsoft NotePad to edit the file, as the editor has problems displaying the line breaks in some types of file.

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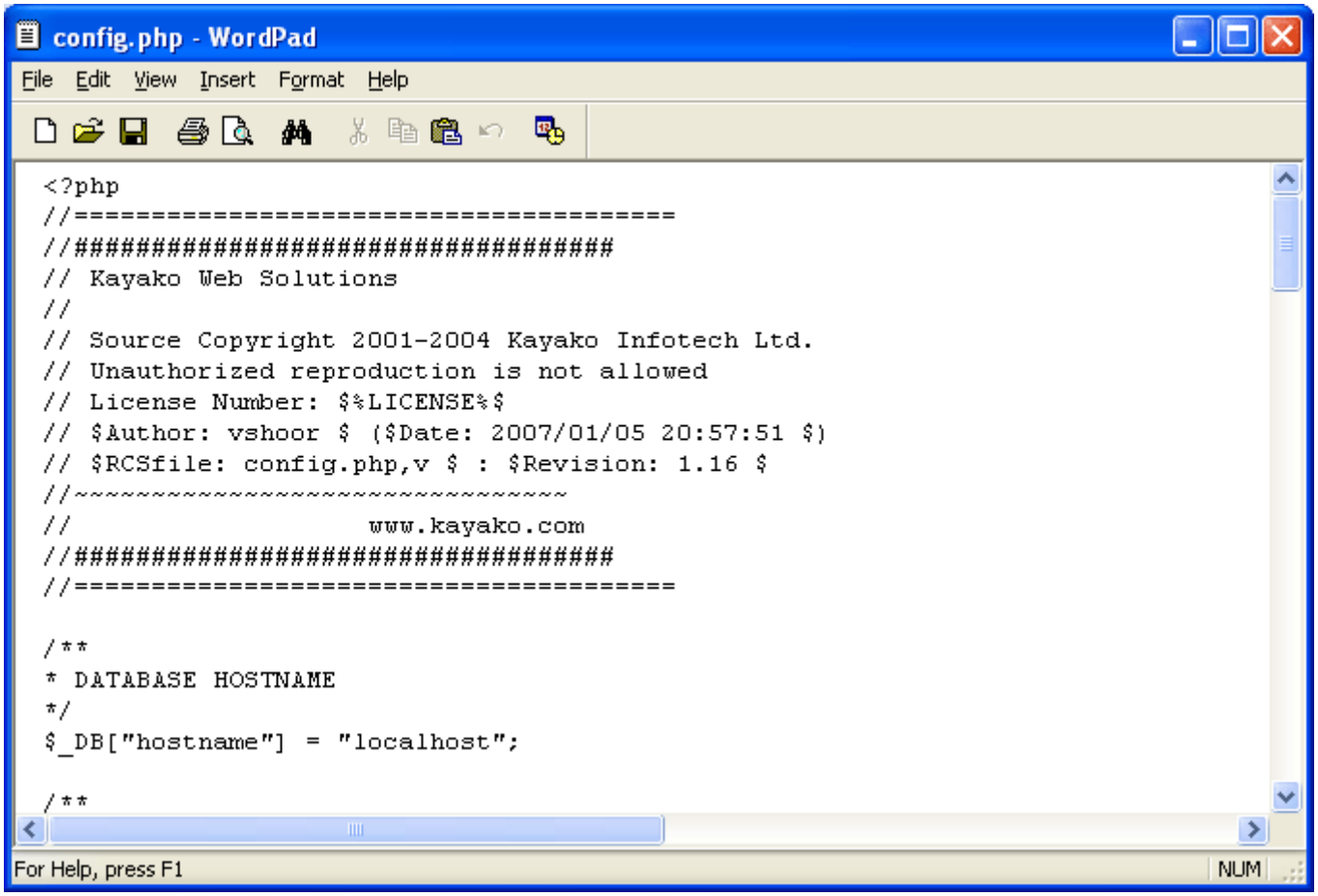

5. The following **variables** in this file must be edited, as described below.

    - **$_DB["hostname"]** - This variable stores the address of your database server. On most installations the database server is located on the same computer as the web server, in which case the address should be set to 'localhost', otherwise use the address of the database server as supplied by your web host.

    - **$_DB["username**"] - This variable contains the username provided to you by your host for connecting to your database server.

    - **$_DB["password"]** - The password that accompanies the database username should be entered here.

    - **$_DB["name"]** - This variable should be altered to state the name of the database that will contain your installation on the database server.

6. Note that for the purposes of this installation guide, the database information we would use if the database name, username and password were the same as those set earlier:

    - **$_DB["hostname"]** = localhost

    - **$_DB["username**"] – kayako_suite

    - **$_DB["password"]** - support

    - **$_DB["name"]** - kayako_suite

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7. The rest of the settings in the file should be left unchanged unless you are very familiar with the system.

8. Once finished editing the file, save the file.

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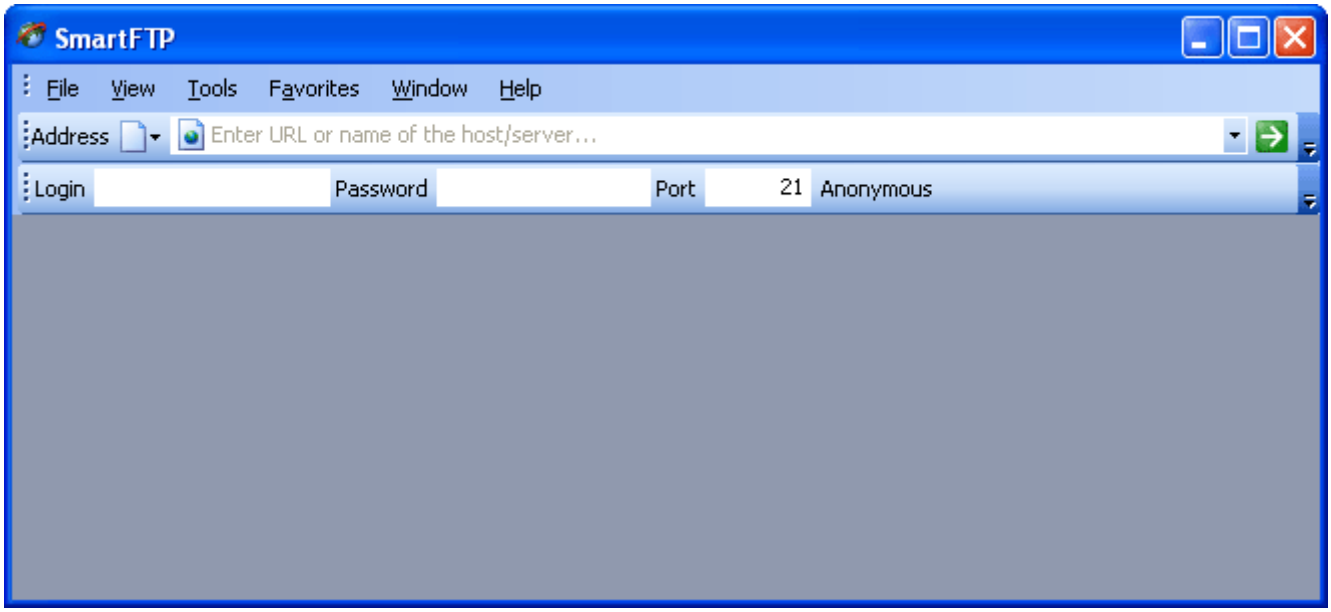
Step six: Uploading the files

In this guide, we will use the FTP client **SmartFTP** to upload the files to the web server. SmartFTP is a freely available (for non-commercial use) SmartFTP client, available from www.smartftp.com. Most FTP clients are very similar to each other, so this guide may still be applicable to users of other clients (such as CuteFTP or BulletProof FTP).

1. Start your FTP client.



2. Ensure that the transfer mode is set to **binary**. Normally, the default transfer mode of an FTP client is not set to binary. It is essential this step is taken, otherwise your files may corrupt.

3. Click on the **Tools** menu.

4. Click on **Settings**.

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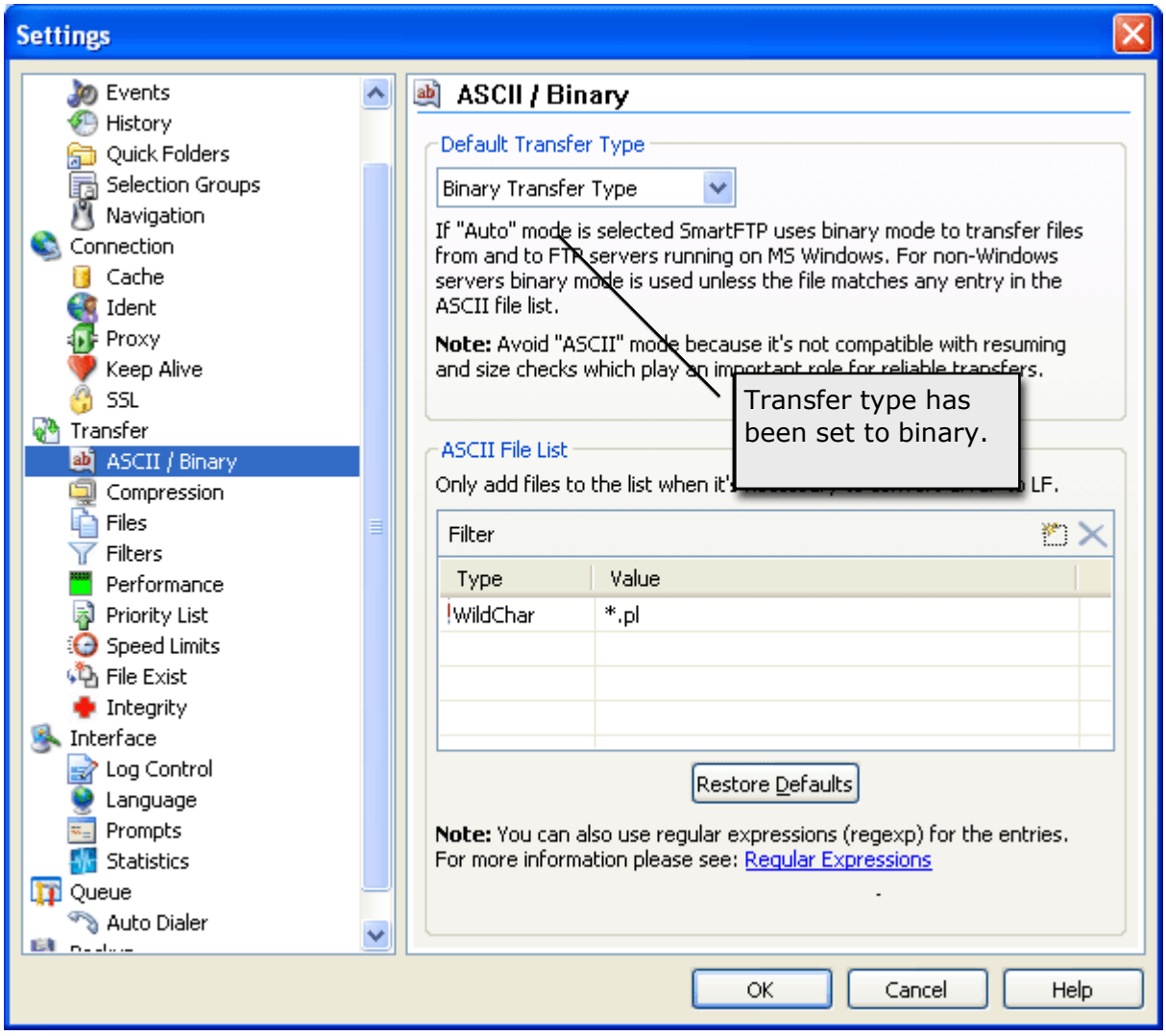

5. Ensure the transfer type is set to binary, as shown above.

6. Connect to your web server using the **FTP hostname**, **username** and **password** for your web server's FTP access account. This information will be available from your web host or your system administrator.

7. Browse to the path of your web server to where you want to install the software (typically, if you wanted the support desk to be available at www.yourdomain/support, you would install the software in the **support** folder of your public files root folder (files that are accessible via the World Wide Web – this folder is called **public_html** in cPanel and **httpdocs** in Plesk Control Panel).

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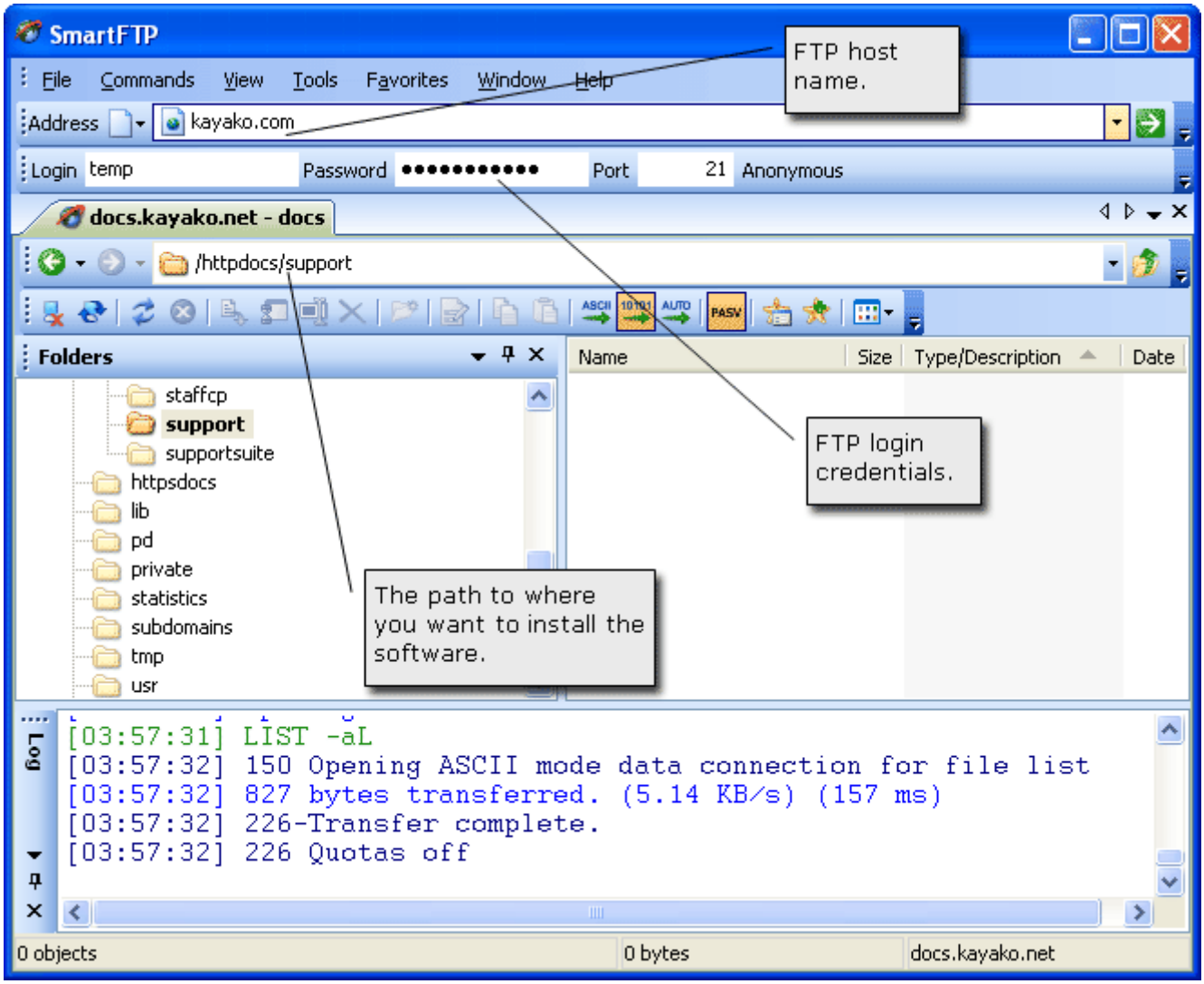

8. You are now ready to upload the software files to the web server.
9. In SmartFTP (as shown below), press CTRL+L to open a new **local browser window**.

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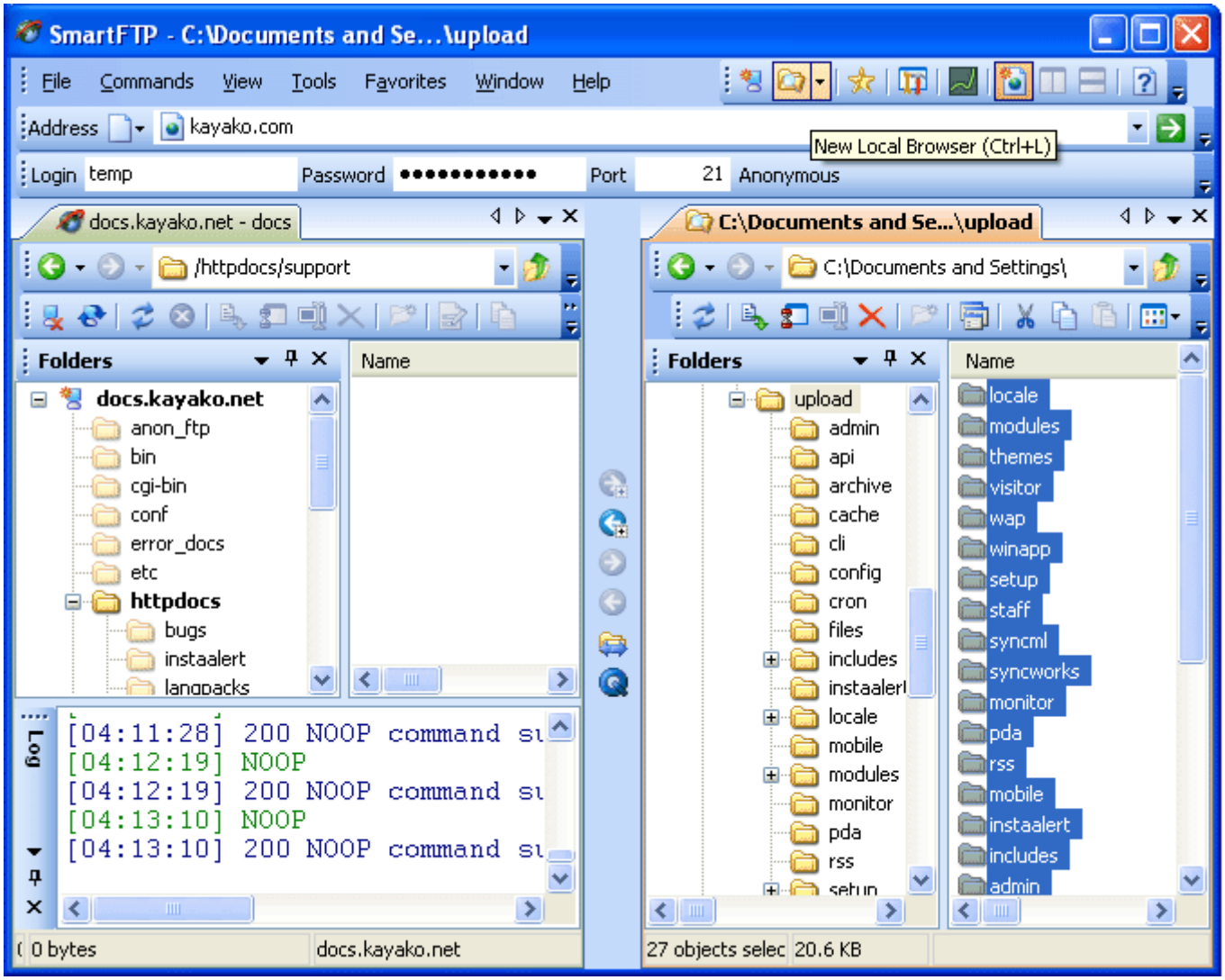

10. Within the local browser, navigate to the **uploads** folder within the location to which you extracted the package files.

11. Select the entire contents of the **uploads** folder, and drag the files and folders into the **FTP server browser** (shown to the left in the figure above).

12. Release the mouse button and the files will begin to upload, as shown below.

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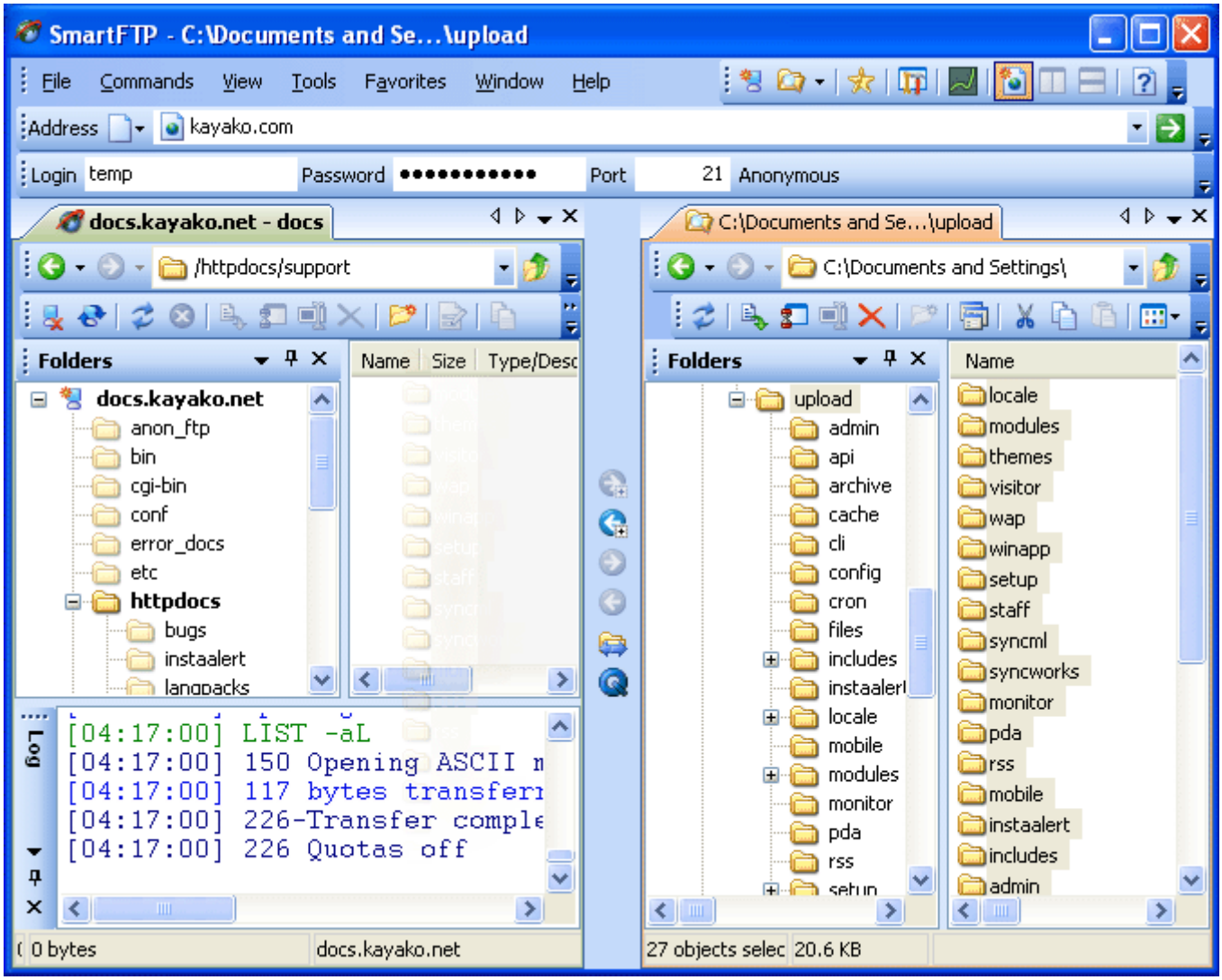

13. Once uploaded, the file list on the left (the **FTP server files**) and the files on the right (the files on your **hard disk drive**) should look identical.

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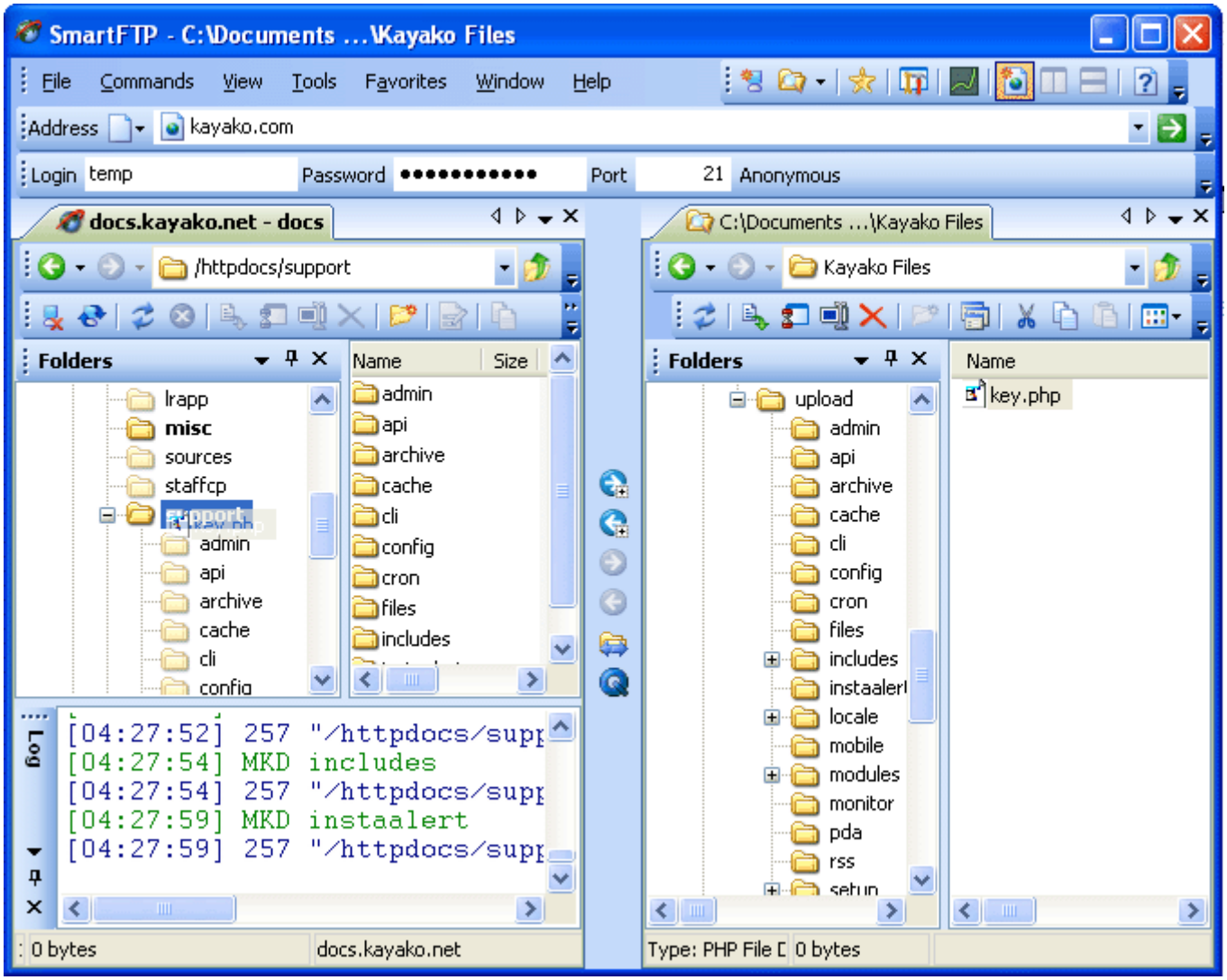
Step seven: Upload the key.php file

Using the methods described in step six, the **key.php** (downloaded in step one) needs to be uploaded to the root of the SupportSuite, eSupport or LiveResponse installation.

For example, if your software files have been uploaded to the folder **/support/**, the key.php file needs to be uploaded to this same folder. If you do not upload the key.php file to the correct location, the system will display an error and will not function correctly without a valid key file.



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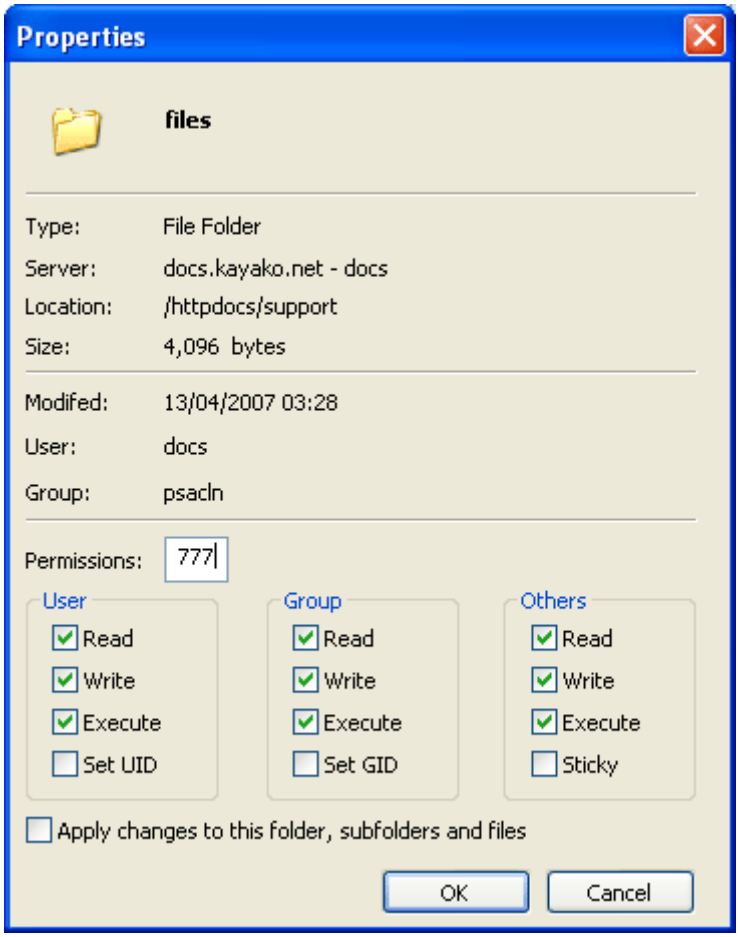
Step eight: Setting file permissions

Both the **cache** and the **files** folder which have been uploaded to your web server need to be made "writeable", as the system uses these files to store data such as template caches and attachments.

As previously, this guide will use the SmartFTP (www.smartftp.com) client to perform the file permission changes. However, most FTP clients are very much similar to each other, so differences in procedures should be few.

1. In your FTP client, browse to the location to which you have uploaded the software files.
2. Right click on the **cache folder**.
3. Click on **Permissions**.



4. To make the folder writeable, we will "CHMOD" the folder to **777** (as shown above).
5. Click on the **OK** button to make the permission changes.
6. Repeat the procedure for the **files** folder.

Note that if on a Microsoft Windows server, change the permissions of the **cache** and **files** folders to *Read-Write-Execute*.

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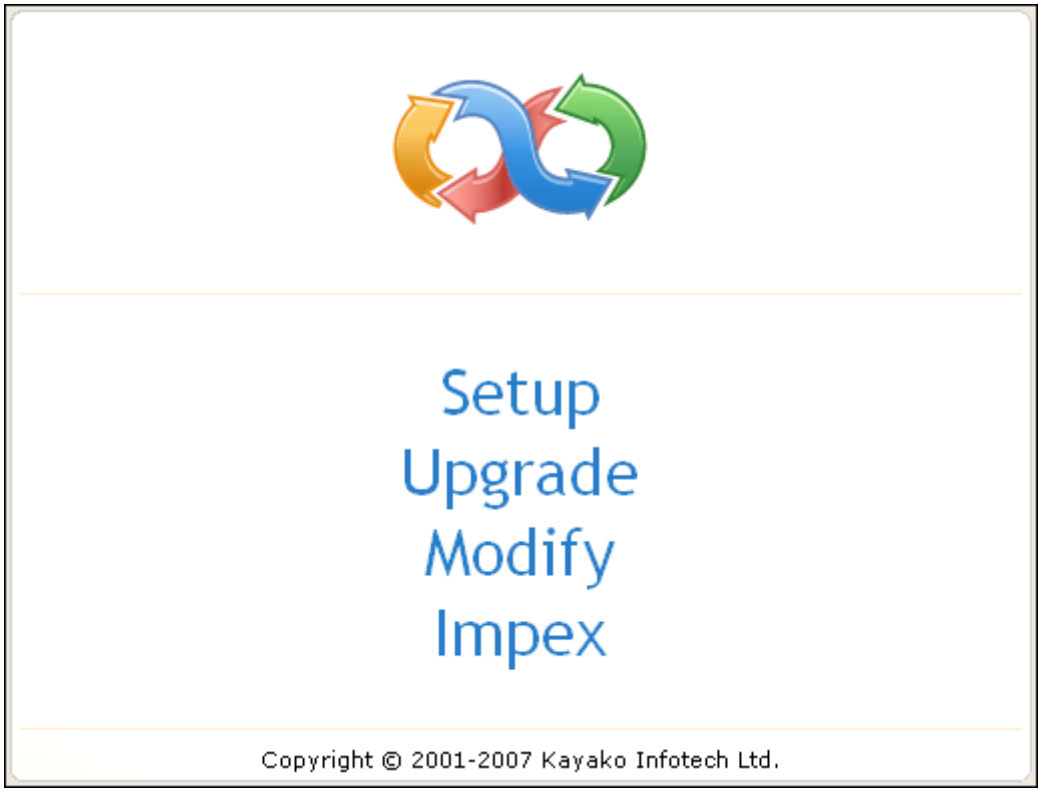
Step nine: Performing a first-time installation

1. The setup scripts are located in the **/setup/** folder. If you have uploaded your software files to www.mydomain.com/support, then you will find the setup scripts at www.mydomain.com/support/setup.

2. Click on the **Setup** option from the setup menu, as shown below.



3. You will be prompted to review the license agreement. Click on the **I Agree** button to continue.

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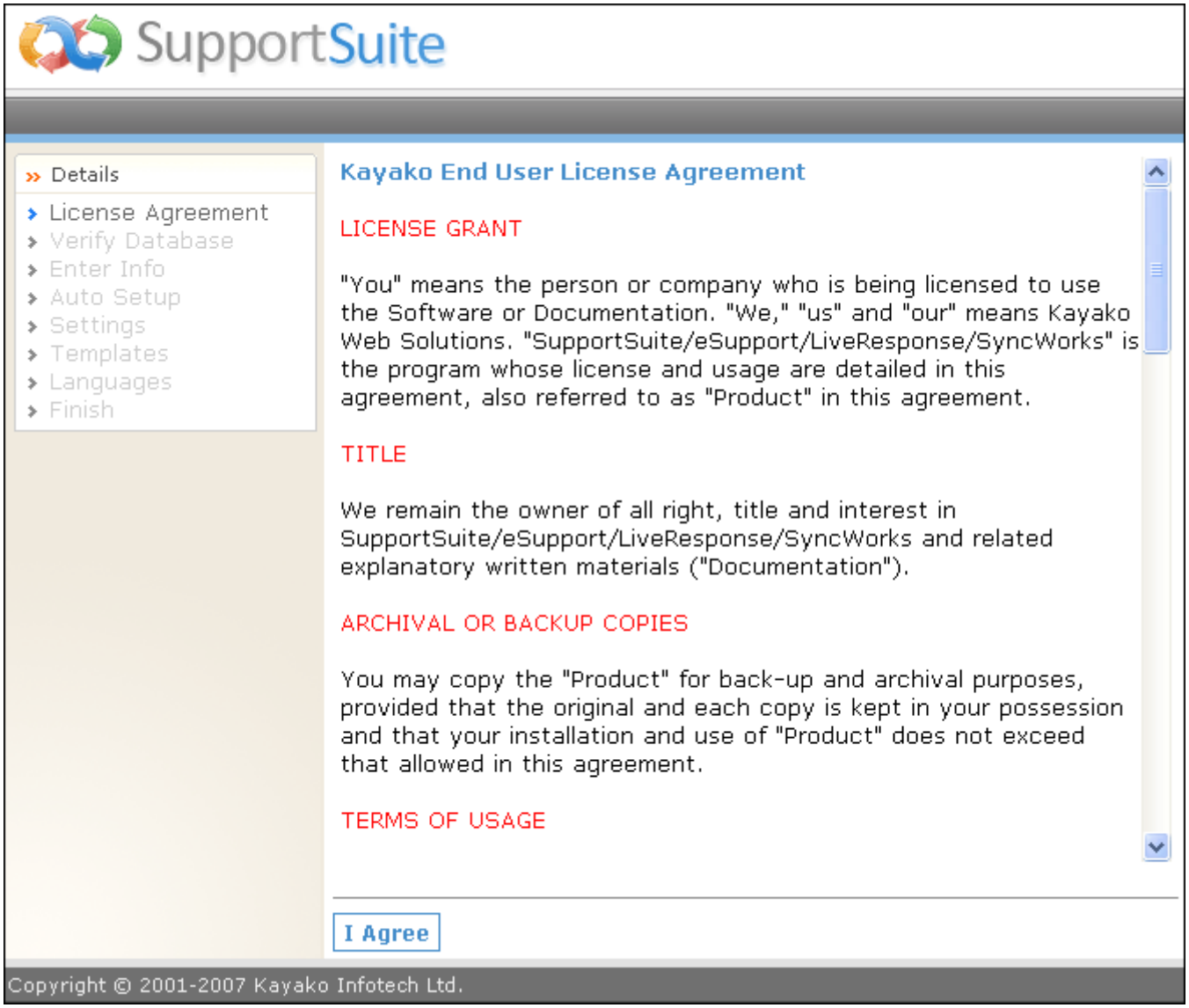
SupportSuite
Details
License Agreement
Verify Database
Enter Info
Auto Setup
Settings
Templates
Languages
Finish
Kayako End User License Agreement
LICENSE GRANT
"You" means the person or company who is being licensed to use the Software or Documentation. "We," "us" and "our" means Kayako Web Solutions. "SupportSuite/eSupport/LiveResponse/SyncWorks" is the program whose license and usage are detailed in this agreement, also referred to as "Product" in this agreement.
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4. The setup scripts will check to ensure that you have all the necessary requirements and have successful completed all of the installation tasks up until now.

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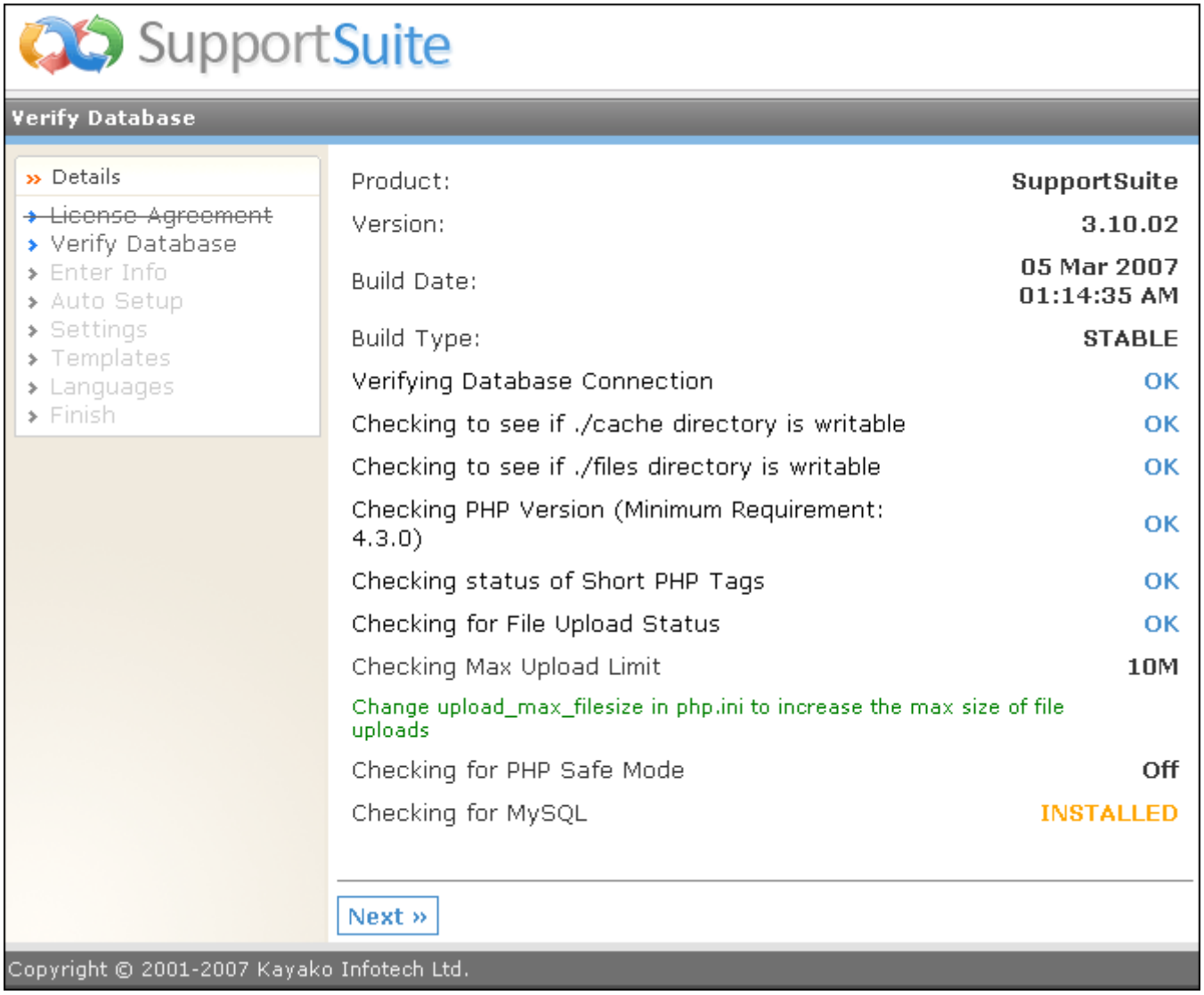
SupportSuite
Verify Database
Details
License Agreement
Verify Database
Enter Info
Auto Setup
Settings
Templates
Languages
Finish
Product: SupportSuite
Version: 3.10.02
Build Date: 05 Mar 2007 01:14:35 AM
Build Type: STABLE
Verifying Database Connection OK
Checking to see if ./cache directory is writable OK
Checking to see if ./files directory is writable OK
Checking PHP Version (Minimum Requirement: 4.3.0) OK
Checking status of Short PHP Tags OK
Checking for File Upload Status OK
Checking Max Upload Limit 10M
Change upload_max_filesize in php.ini to increase the max size of file uploads
Checking for PHP Safe Mode Off
Checking for MySQL INSTALLED
Next »
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5. If there are no errors, click on the **Next** button to proceed.

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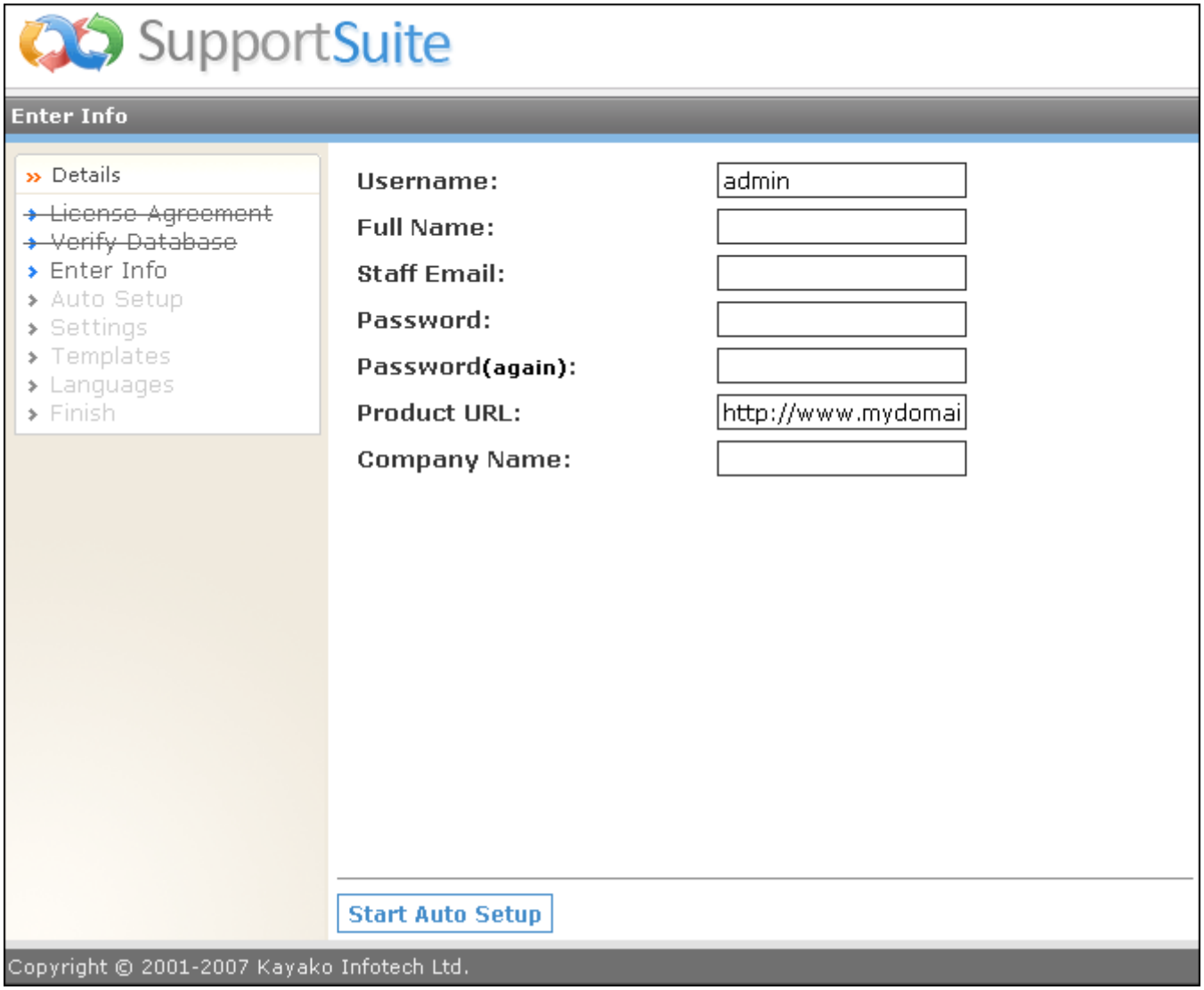

6. You will be prompted to enter the settings for the default **administrator account** and the settings for your support desk.

    a. **Product URL** should be the URL to your SupportSuite, eSupport and LiveResponse installation (the one your clients will access in order to visit your support desk).

7. Click on the **Start Auto Setup** button to begin the automated setup procedure.

8. Many screens (such as the one shown below) will appear while the database is populated with a default set of data.

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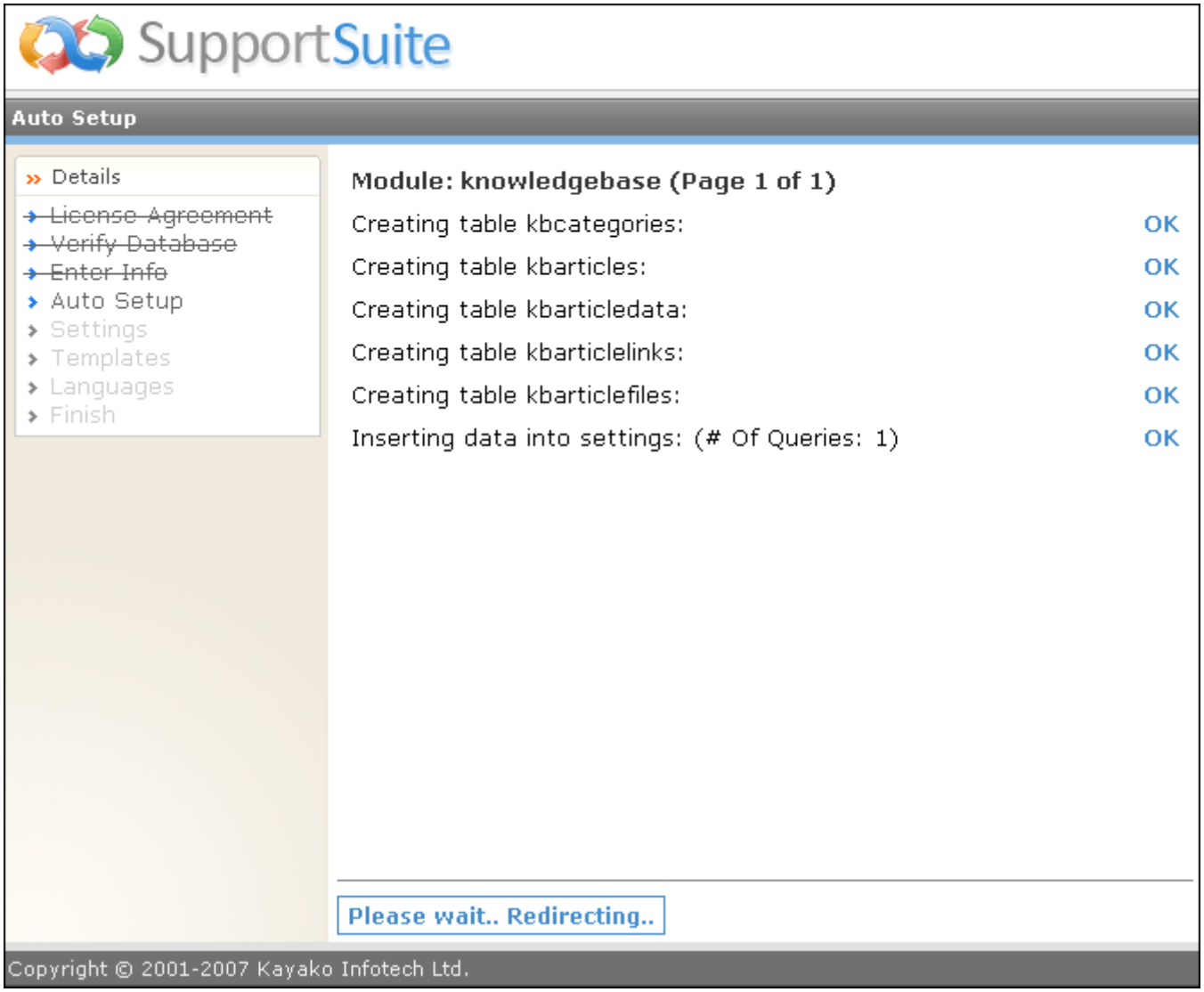

9. When the auto-installer reaches the end of the **Troubleshooter** module installation, click on the red **Settings** button to proceed with the installation.

10. The system will populate the database with a default set of settings.

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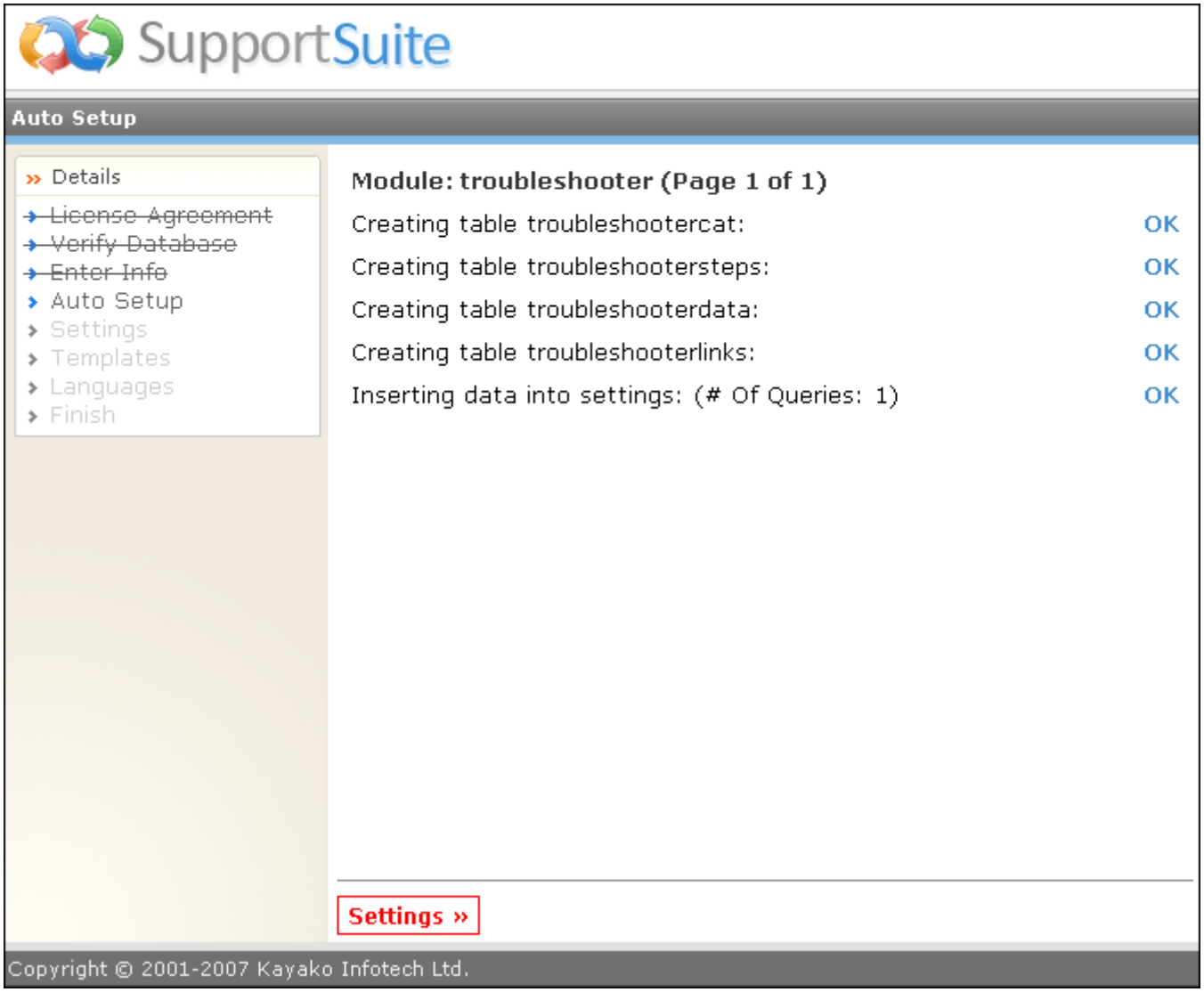

11. Keep pressing the red continue button for each of the stages until you reach the finish screen.

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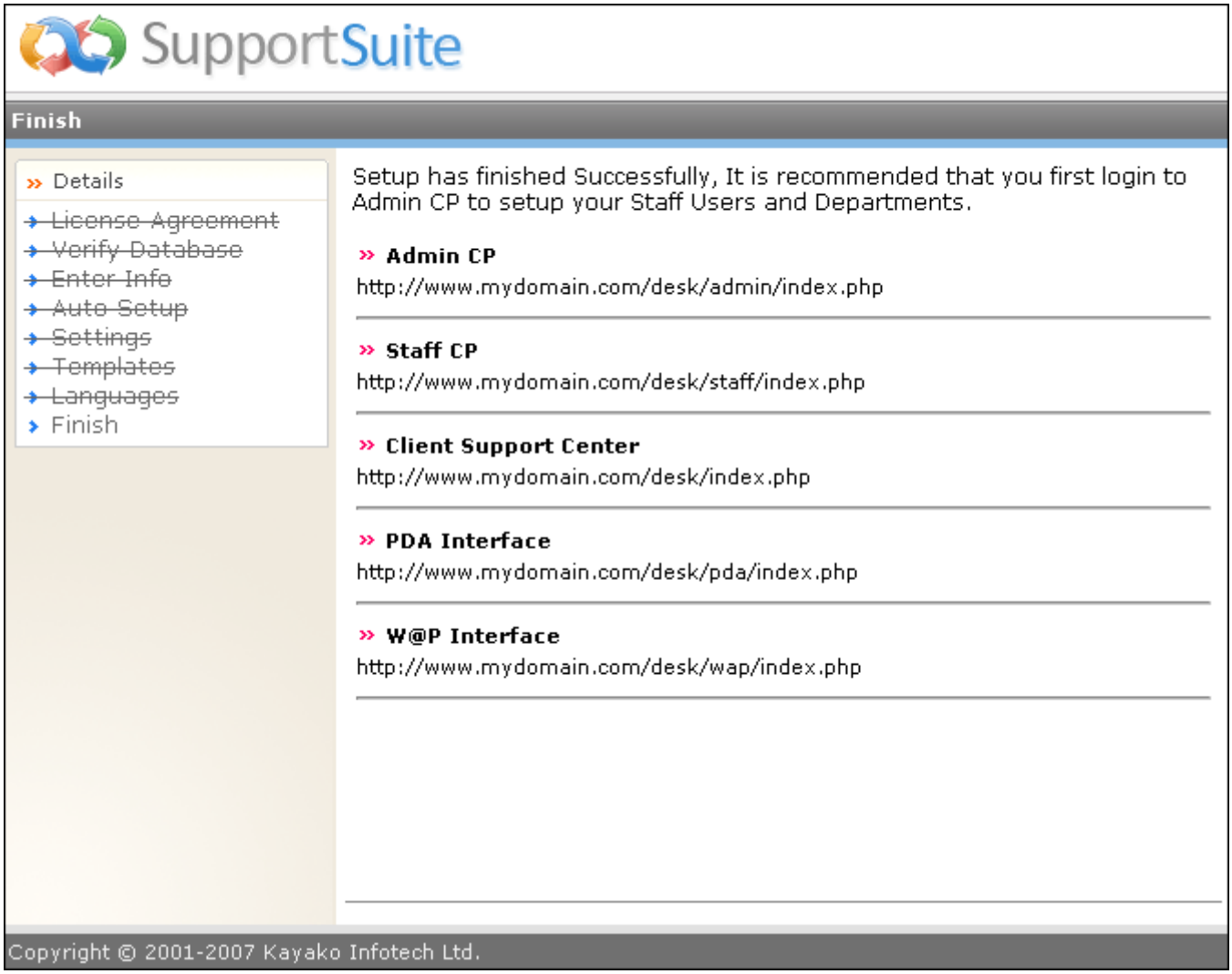

12. Congratulations, the installation has been successfully completed.

13. You must now **delete the /setup/** folder from your FTP server as a security measure. You will receive warnings if you do not do this step.

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Upgrading

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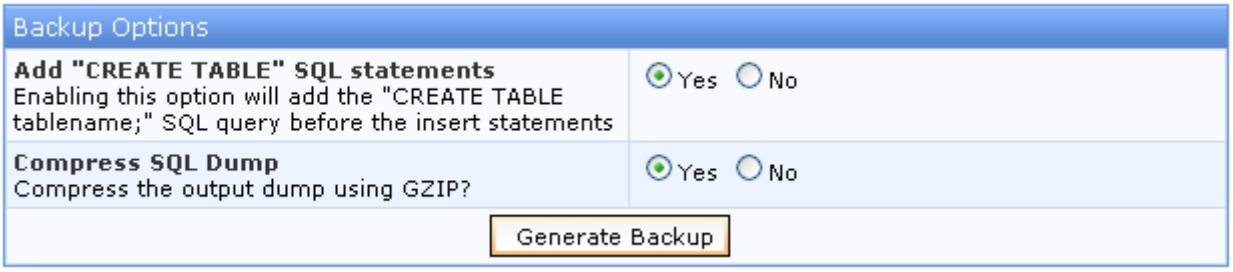
Upgrading to a newer build

This procedure involves upgrading to a newer SupportSuite, eSupport or LiveResponse build. For example, if you are currently running **v3.10.00** and wish to upgrade to **v3.10.02**, this is the procedure to follow.

Step one: Backing up your data

Be sure to back up your data before performing any upgrade. At the very least, we recommend that you take a database backup before running and upgrade scripts.

Within the administrator control panel, SupportSuite, eSupport and LiveResponse allow you to take a backup of your MySQL database. The backup utility can be found under the **Database** menu.



- **Add "CREATE TABLE" SQL statements** – if enabled, the table schema will also be backed up in the database backup file.
- **Compress SQL Dump** – if enabled, the database backup file will be compressed before being sent to your web browser.

This procedure may not be successful if your database size is big very large, as the script will time out before the back up file is generated.

If you have a particularly large database, backing up and downloading this way may not be a viable or reliable option. In such a case, it is recommended that you take a MySQL backup either via your control panel software (such as cPanel or Plesk Control Panel), phpMyAdmin or via command prompt.

To take a MySQL database dump (backup file) via the MySQL CLI command prompt, use the following command:

- mysqldump --opt -Q -u *dbusername* -p *databasename* > */path/to/backupname.sql*

If your MySQL server is hosted externally, you can use this command to connect to it and take a backup dump:

- mysqldump --opt -Q -h *hostname* -u *dbusername* -p *databasename* > */path/to/backupname.sql*

Step two: Getting the files

See downloading the package in the installation guide.

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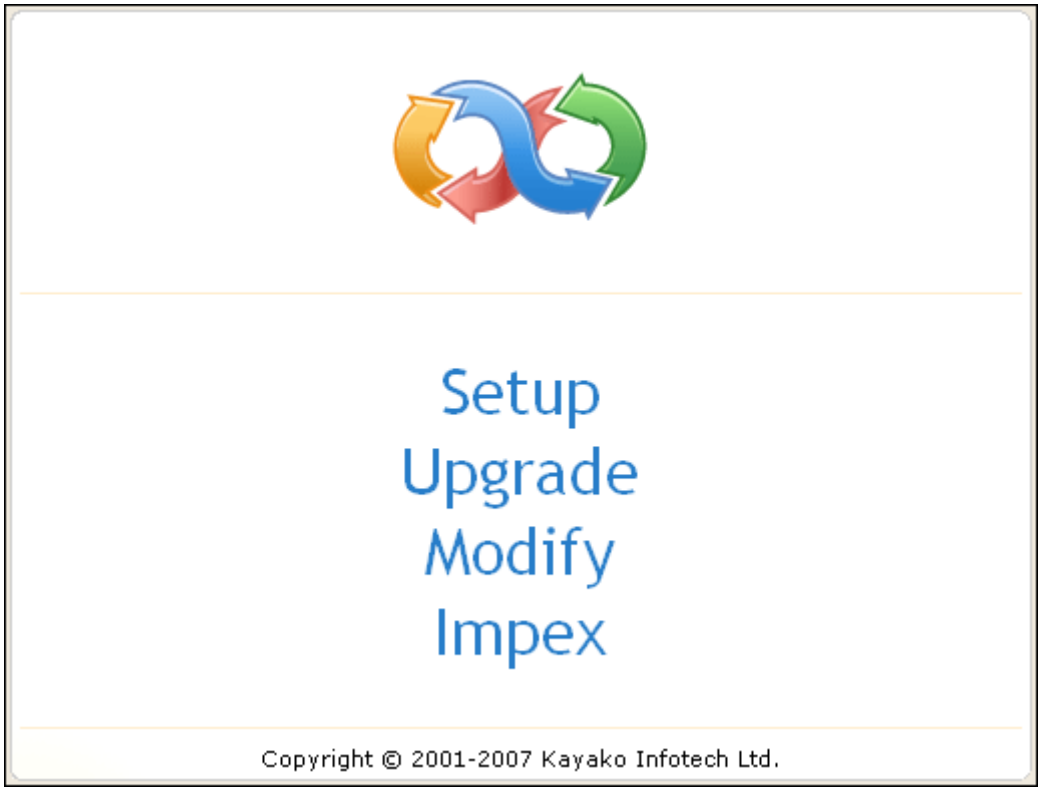
Step three: Uploading the files

See uploading the files in the installation guide.

When uploading the new files, take care not to overwrite the existing **/config/config.php** file; otherwise you will lose your database connection settings and the system will not function.

Step four: Running the upgrade script

1. The upgrade script is run from the **Setup** menu, found in the **/setup/** directory of your SupportSuite, eSupport or LiveResponse installation (www.yourdomain.com/*yourinstallpath*/setup).



2. Click on the **Upgrade** link.

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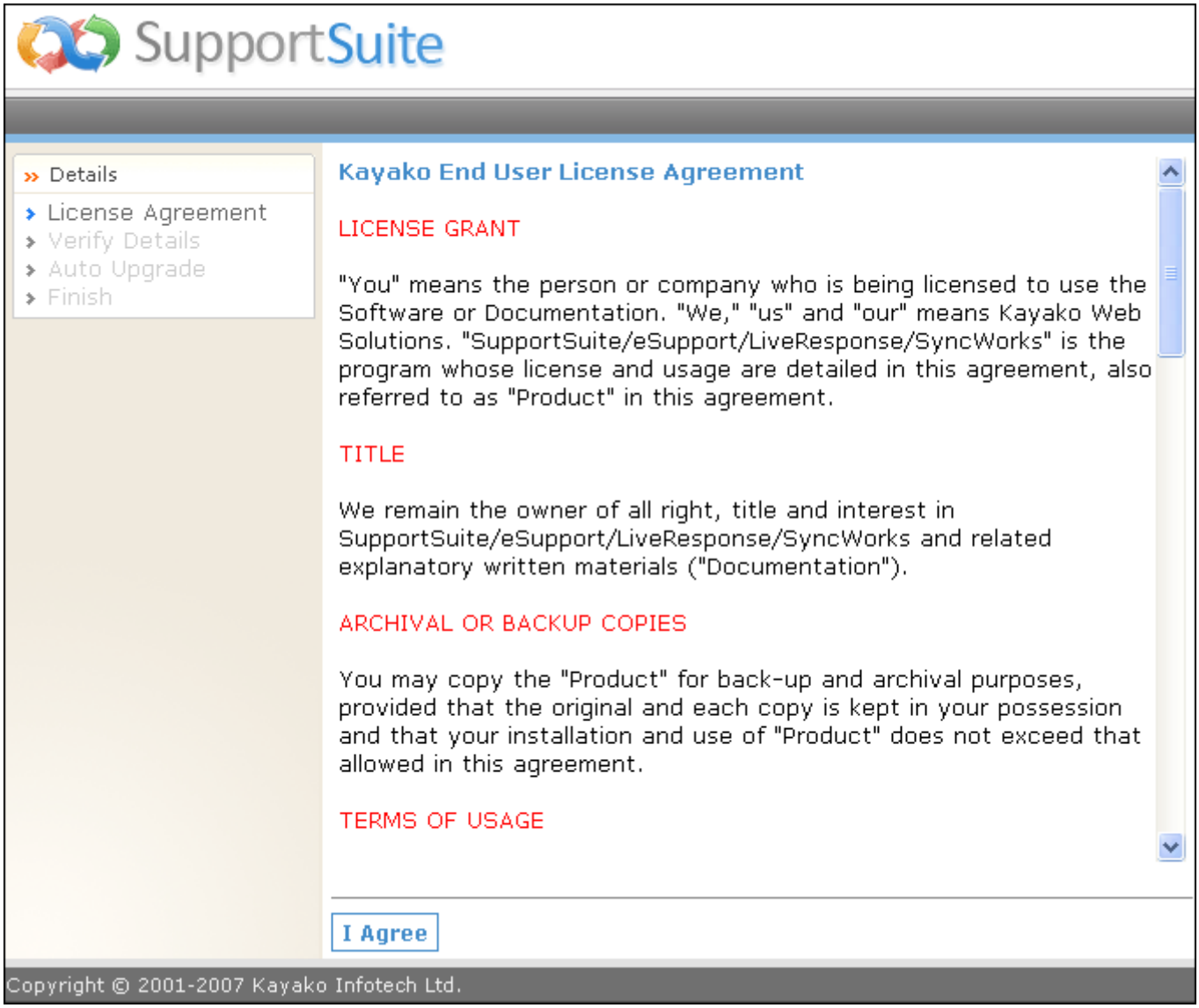
SupportSuite
Details
License Agreement
Verify Details
Auto Upgrade
Finish
Kayako End User License Agreement
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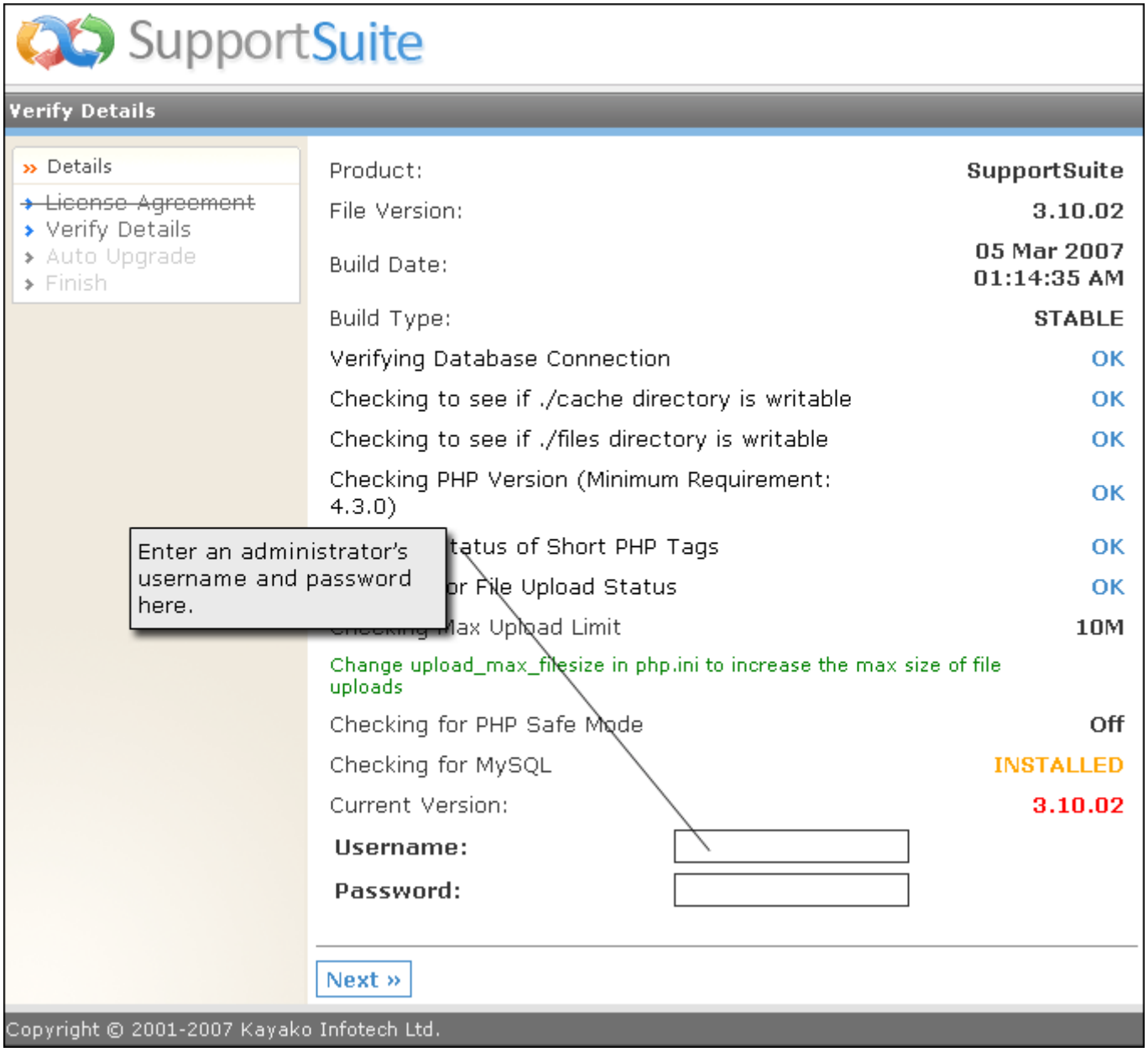
SupportSuite
Verify Details
Details
License Agreement
Verify Details
Auto Upgrade
Finish
Product: SupportSuite
File Version: 3.10.02
Build Date: 05 Mar 2007 01:14:35 AM
Build Type: STABLE
Verifying Database Connection OK
Checking to see if ./cache directory is writable OK
Checking to see if ./files directory is writable OK
Checking PHP Version (Minimum Requirement: 4.3.0) OK
tatus of Short PHP Tags OK
or File Upload Status OK
ax Upload Limit 10M
Change upload_max_filesize in php.ini to increase the max size of file uploads
Checking for PHP Safe Mode Off
Checking for MySQL INSTALLED
Current Version: 3.10.02
Username:
Password:
Enter an administrator's username and password here.
Next »
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5. Click on the **Next** button to continue with the upgrade.

6. All of the database amendments and updates will be made automatically. Upon successful completion, a **Your version is now up to date** message will be displayed.

7. You must now **delete the /setup/** folder from your FTP server as a security measure. You will receive warnings if you do not do this step.

Step five: Checking for updated template files

Because a SupportSuite, eSupport or LiveResponse update may also contain updated templates as well as updated files, it is necessary to check for templates that require a **revert** back to the new, updated "original" version of the template in order to implement a change brought by the upgrade.

Template reverting is not performed automatically because the process will cause any customizations to a template to be lost. Therefore, template reverts must be performed manually. For more

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information on template reverting and searching for updated templates, see restoring templates in the administrator control panel).

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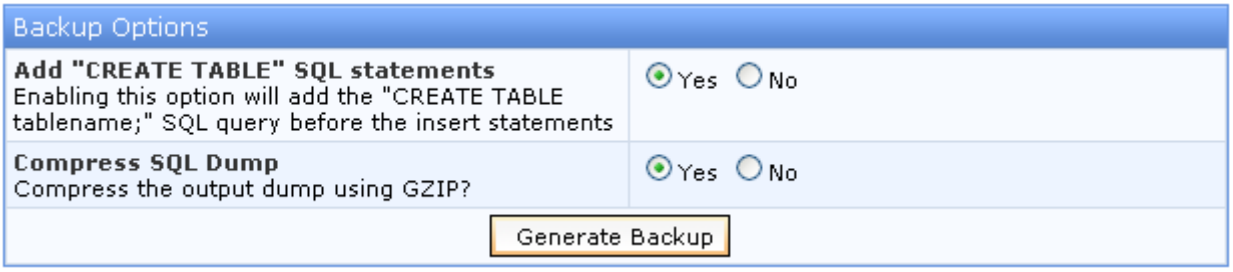
Upgrade from eSupport or LiveResponse to SupportSuite

The procedure involves upgrading your eSupport or LiveResponse installation to the SupportSuite package (which combines eSupport and LiveResponse).

Step one: Backing up your data

Be sure to back up your data before performing any upgrade. At the very least, we recommend that you take a database backup before running and upgrade scripts.

Within the administrator control panel, eSupport and LiveResponse allow you to take a backup of your MySQL database. The backup utility can be found under the **Database** menu.



8. **Add "CREATE TABLE" SQL statements** – if enabled, the table schema will also be backed up in the database backup file.

9. **Compress SQL Dump** – if enabled, the database backup file will be compressed before being sent to your web browser.

This procedure may not be successful if your database size is big very large, as the script will time out before the back up file is generated.

If you have a particularly large database, backing up and downloading this way may not be a viable or reliable option. In such a case, it is recommended that you take a MySQL backup either via your control panel software (such as cPanel or Plesk Control Panel), phpMyAdmin or via command prompt.

To take a MySQL database dump (backup file) via the MySQL CLI command prompt, use the following command:

- mysqldump --opt -Q -u *dbusername* -p *databasename* > */path/to/backupname.sql*

If your MySQL server is hosted externally, you can use this command to connect to it and take a backup dump:

- mysqldump --opt -Q -h *hostname* -u *dbusername* -p *databasename* > */path/to/backupname.sql*

Step two: Getting the files

See downloading the package in the installation guide.

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Step three: Uploading the files

See uploading the files in the installation guide.

Step four: Uploading the new license key file

See activating your license and downloading the key file and upload the key.php file in the installation guide. The key.php file that currently resides on your web server must be replaced with the new SupportSuite key.php file.

Step five: Editing the config.php file

See editing the config.php file in the installation guide.

Step five: Running the upgrade script

This procedure will describe how to upgrade from eSupport to SupportSuite. This procedure is almost identical to that of upgrading from LiveResponse to SupportSuite.

With the newest files uploaded to your web server, you can now proceed to run the upgrade script.

1. The upgrade script is run from the **Setup** menu, found in the **/setup/** directory of your SupportSuite, eSupport or LiveResponse installation (www.yourdomain.com/*yourinstallpath*/setup).

2. Select the **Modify** option.

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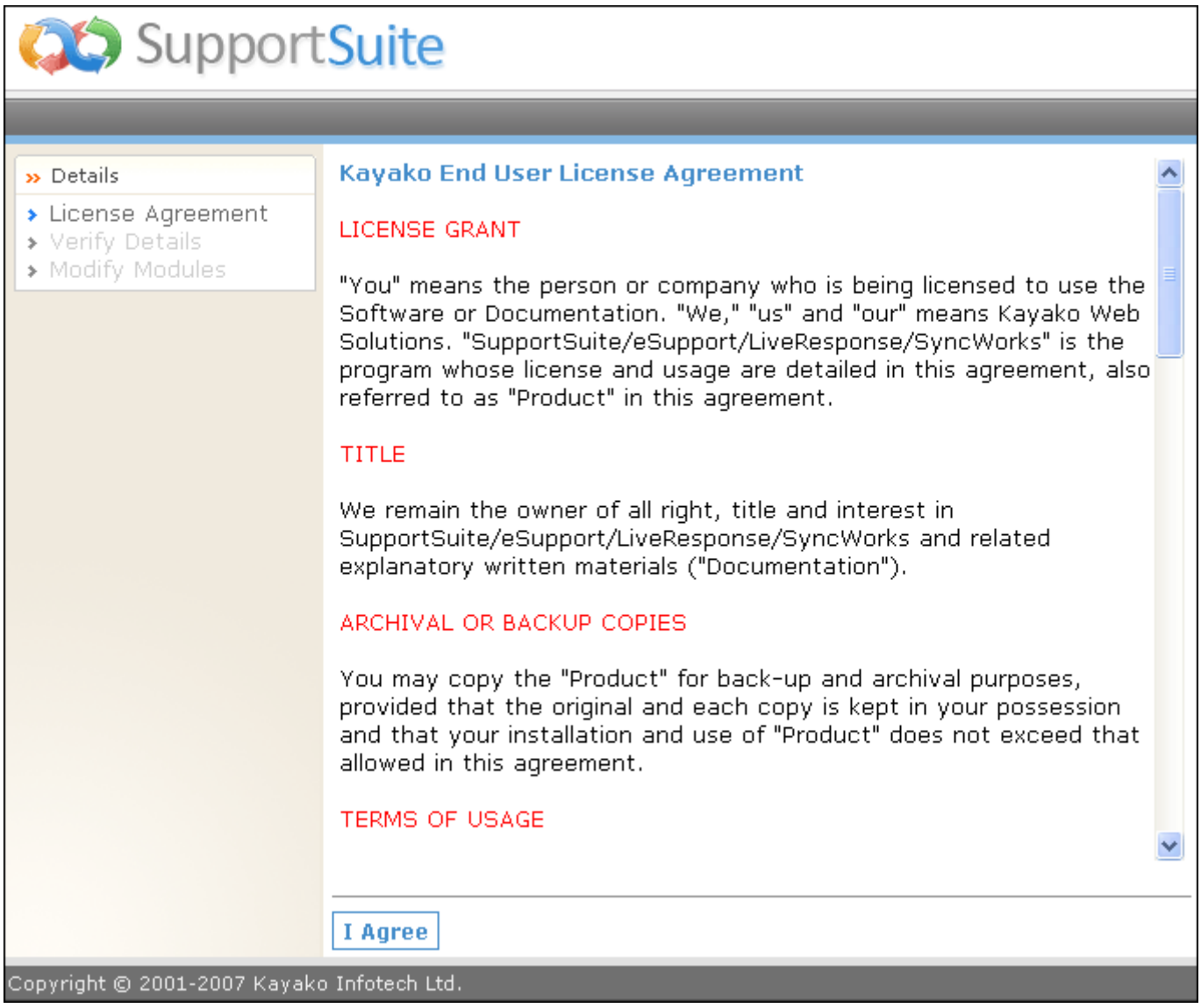
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Verify Details
Modify Modules
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3. Review the license agreement. Click on the **I Agree** button to continue.
4. Enter your (or a) administrator username and password into the fields as indicated to below.

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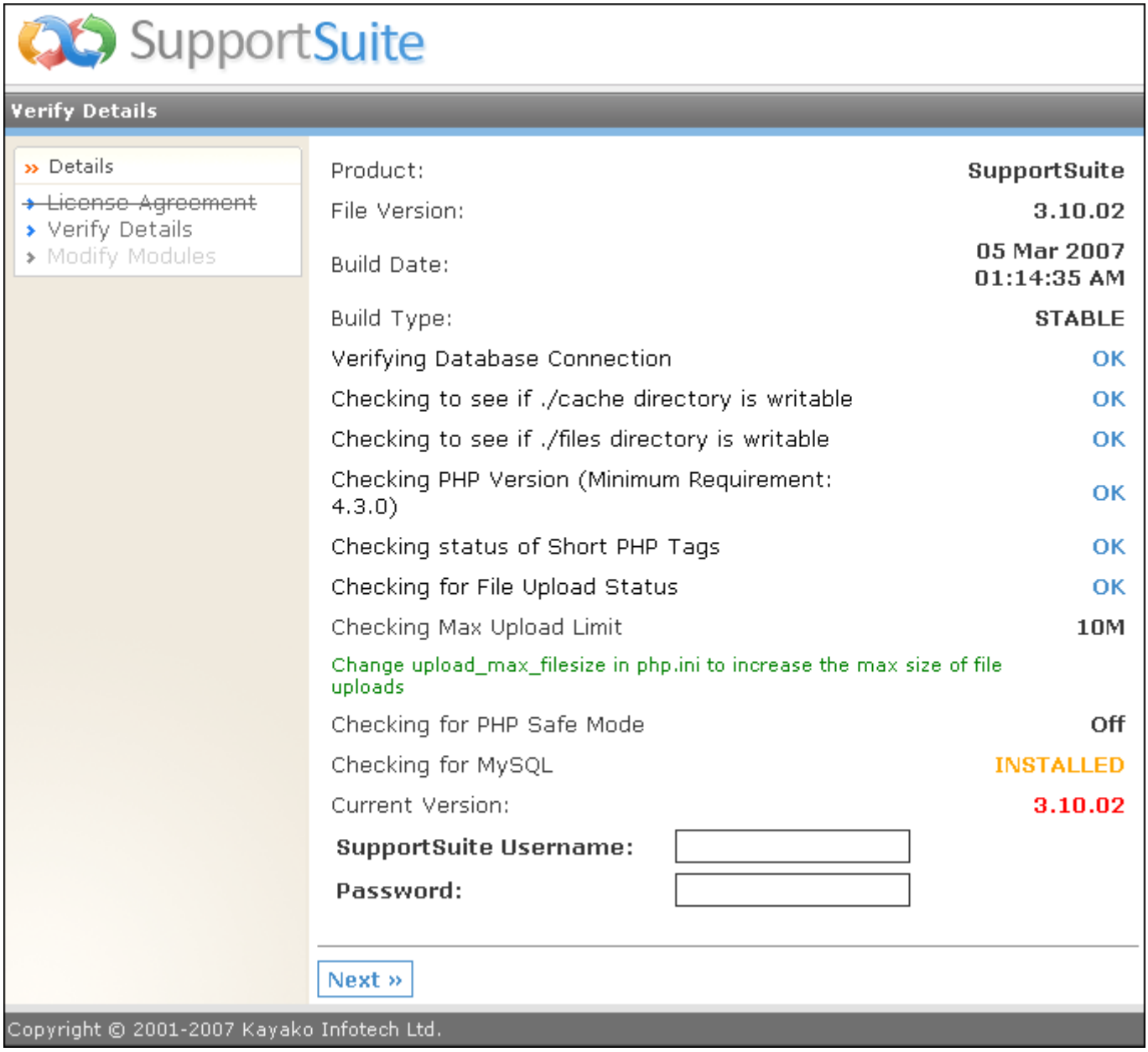
SupportSuite
Verify Details
» Details
License Agreement
Verify Details
Modify Modules
Product: SupportSuite
File Version: 3.10.02
Build Date: 05 Mar 2007 01:14:35 AM
Build Type: STABLE
Verifying Database Connection OK
Checking to see if ./cache directory is writable OK
Checking to see if ./files directory is writable OK
Checking PHP Version (Minimum Requirement: 4.3.0) OK
Checking status of Short PHP Tags OK
Checking for File Upload Status OK
Checking Max Upload Limit 10M
Change upload_max_filesize in php.ini to increase the max size of file uploads
Checking for PHP Safe Mode Off
Checking for MySQL INSTALLED
Current Version: 3.10.02
SupportSuite Username:
Password:
Next »
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5. Click on the **Next** button to proceed.

6. The script will provide you with the option to **Install** or **Uninstall** the modules you want to use in the software.

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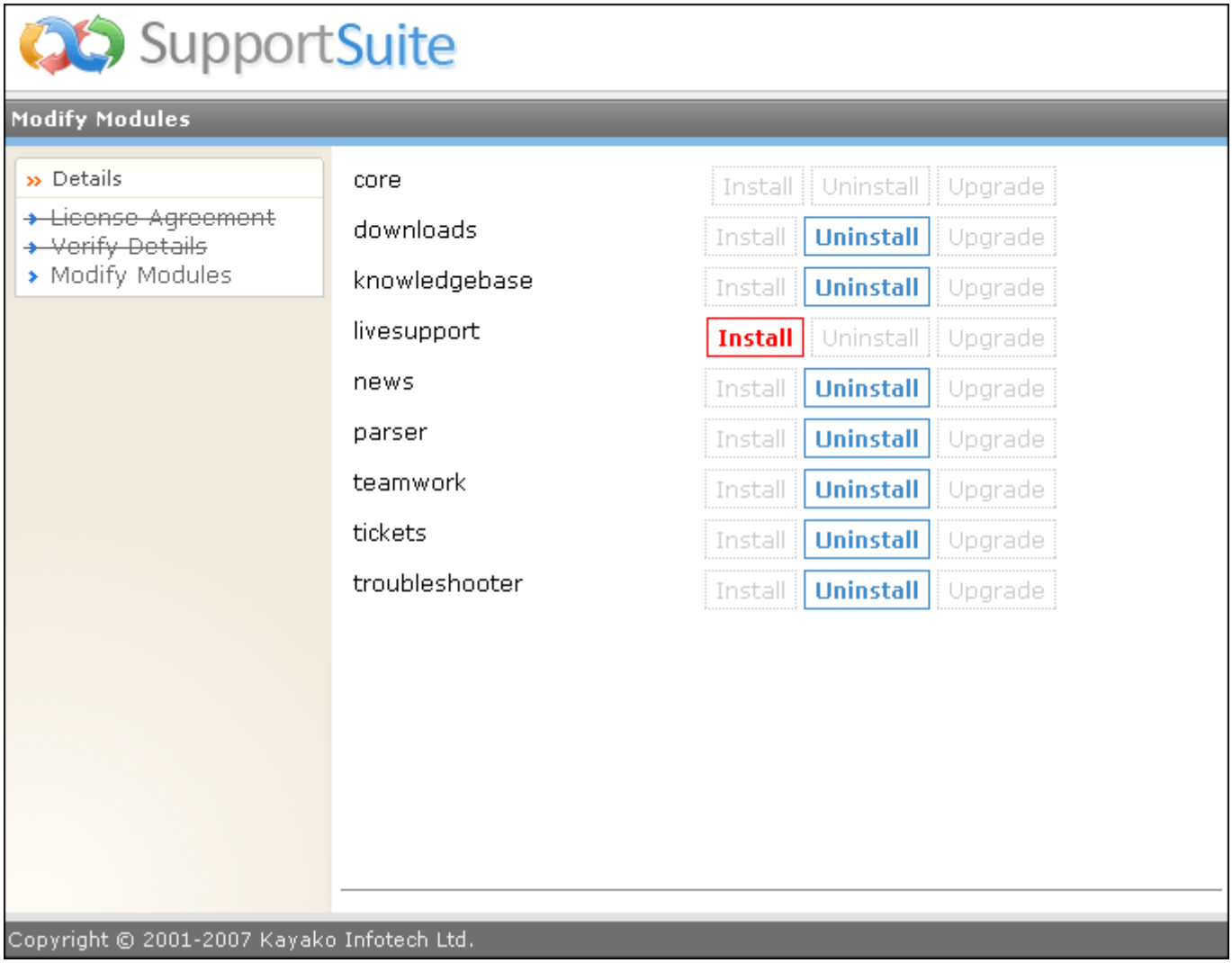

7. Since we are upgrading from eSupport to SupportSuite, we shall be installing the LiveSupport module. Click on the LiveSupport **Install** button to install the module.

8. The script will automatically install the LiveSupport module.

9. If we were upgrading from LiveResponse to SupportSuite, this procedure would be exactly the same except that we would be installing the Tickets module rather than the LiveSupport module.

10. The LiveSupport module is now successfully installed. To complete the upgrade we now need to run the Upgrade script to rebuild the Settings table.

11. Return back to the **Setup** menu, found in the **/setup/** directory of your SupportSuite, eSupport or LiveResponse installation (www.yourdomain.com/*yourinstallpath*/setup).

12. This time, click on the **Upgrade** link.

13. Accept the license agreement by clicking on the **I Agree** button.

14. Enter the username and password of an administrator account.

15. Click on the **Next** button to continue with the upgrade.

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16. All of the database amendments and updates will be made automatically. Upon successful completion, a **Your version is now up to date** message will be displayed.

17. You must now **delete the /setup/** folder from your FTP server as a security measure. You will receive warnings if you do not do this step.

Step six: Checking for updated template files

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Upgrading from eSupport v2.3.5 to a v3 product

In order to perform an upgrade from eSupport v2, you must first ensure that your eSupport version is at **v2.3.5**. If it is not, you will first have to upgrade eSupport v2 before you can proceed with the v3 upgrade.

From this point on, this guide assumes that your eSupport v2 is v2.3.5.

In order to upgrade from eSupport v2.3.5 to SupportSuite or eSupport v3, you must first complete a full installation of the v3 software (see installation). We will then treat eSupport v2.3.5 as a third party product, from which we will **import** data from into the new installation of v3.

The only eSupport v2.3.5 component that will be required for the upgrade is the database name and database user's username and password in which the eSupport v2.3.5 data is held.

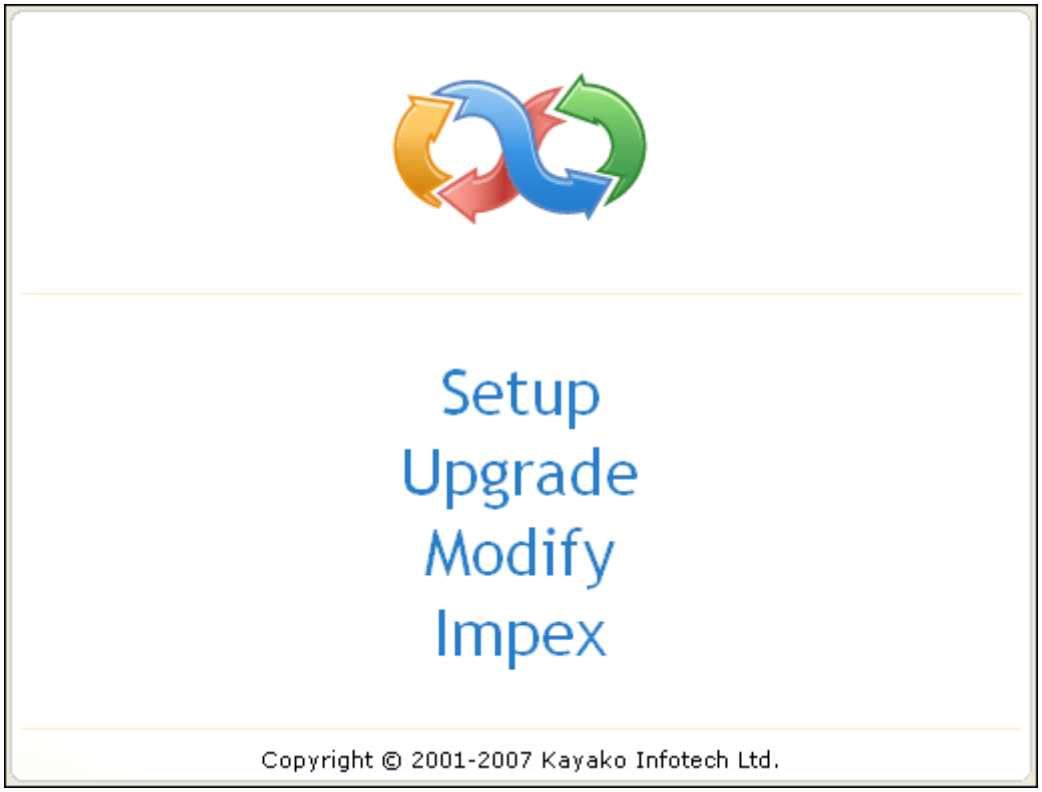
Note: Attachments to tickets will be lost during the upgrade.

Step one: Install version 3

Follow the procedure outlined in the installation guide in installation.

Step two: Use Impex to import the eSupport v2.3.5 data

1. The Impex script is run from the **Setup** menu, found in the **/setup/** directory of your **v3** installation (www.yourdomain.com/*yourinstallpath*/setup).



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2. Click on the **Impex** link.

SupportSuite
Details
License Agreement
Verify Details
Auto Import
Finish
Kayako End User License Agreement
LICENSE GRANT
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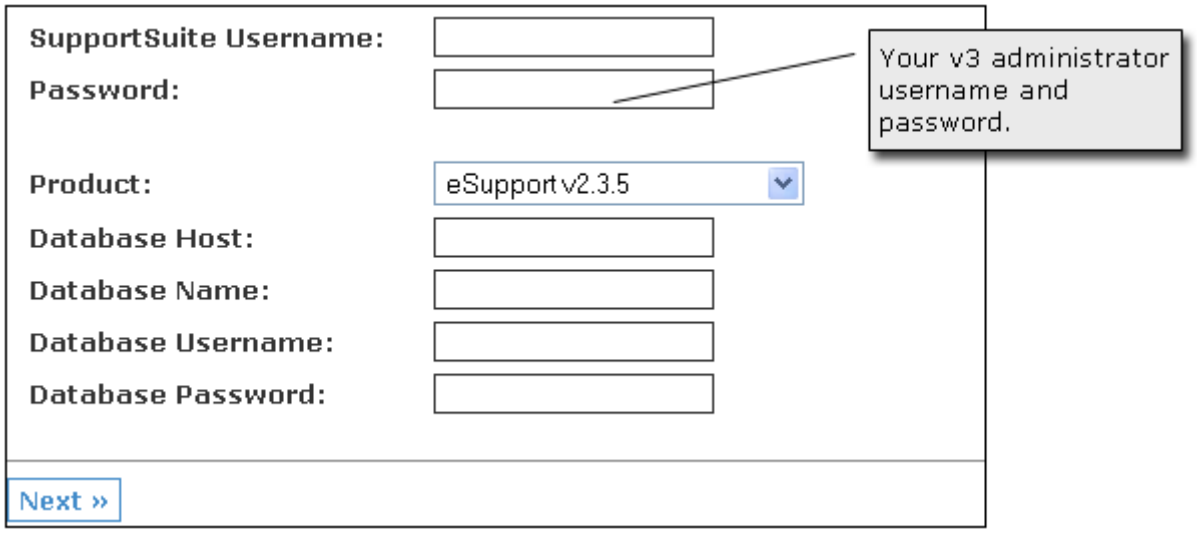
3. Review the license agreement. Click on the **I Agree** button to continue.



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4. Enter your (or a) administrator username and password into the fields as indicated to below. These administrator details must be those created for your **v3 installation**.

    a. Select eSupport v2.3.5 from the drop down menu titled **Product.**

    b. Enter the database host, database name, database username and password. These database details must be for the database that holds your current eSupport v2.3.5 data.

        i. In the case you are not sure of your v2.3.5 installation's database information, you can always retrieve it from the config.php file located in the admin directory of the software.

5. Click on the **Next** button to proceed with the import.

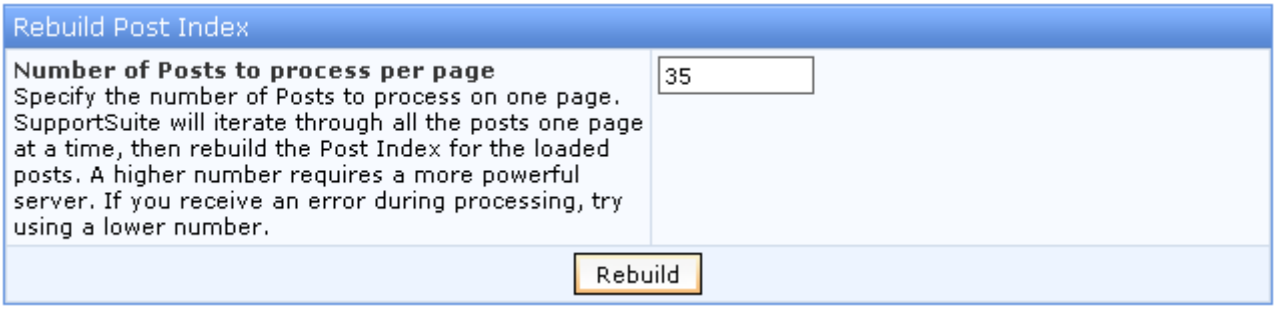
6. On completion, the script shall display the success message 'Import Successful'. You have now successfully imported eSupport v2.3.5 data into the Version 3.

Step three: Rebuild the database indexes

Once having imported the data, it is now necessary to rebuild the search database (rebuild the post index). This is necessary for the search features of the software to work correctly.

1. You can rebuild your post index from the administrator control panel by opening the **Tickets** menu.

2. Click on **Maintenance**.


Rebuild Post Index
Number of Posts to process per page
Specify the number of Posts to process on one page. SupportSuite will iterate through all the posts one page at a time, then rebuild the Post Index for the loaded posts. A higher number requires a more powerful server. If you receive an error during processing, try using a lower number.
35
Rebuild

- **Number of Posts to Process Per Page -** Specify the number of posts that the system should process on one page in the adjacent text box.

3. Click on **Rebuild**.

If you receive an error during processing then try using a lower number for the *Number of Posts to Process Per Page*. Since the process is resource intensive, you will require a powerful server to process a higher number of posts in one batch.

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Using Impex to import from third party systems

In order to migrate to SupportSuite, eSupport or LiveResponse from a third party product you must have already installed a copy SupportSuite, eSupport or LiveResponse. It is into this new installation that the Impex script will import data from a third party system's database.

The Impex system allows you to import data from the following third party products:

- Cerberus Helpdesk
- PerlDesk
- DeskPro
- SupportTrio

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Step one: Install version 3

Follow the procedure outlined in the installation guide in installation.

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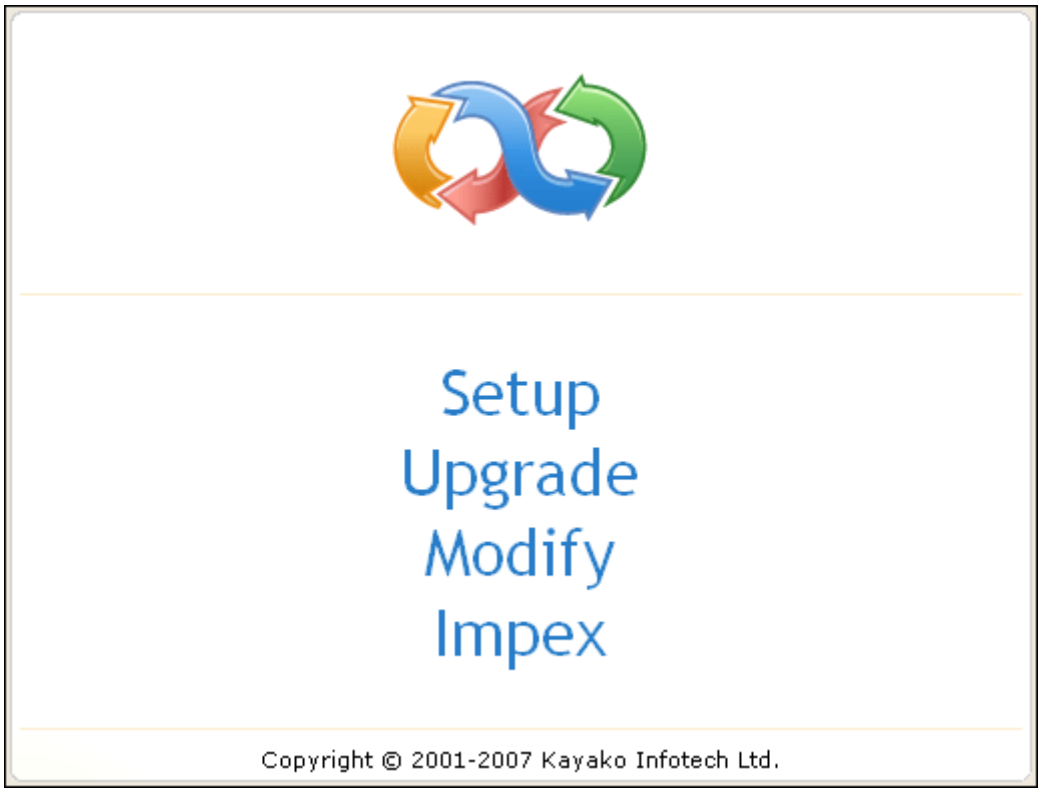
Step two: Use Impex to import the data

1. The Impex script is run from the **Setup** menu, found in the **/setup/** directory of your **v3** installation (www.yourdomain.com/*yourinstallpath*/setup).



2. Click on the **Impex** link.

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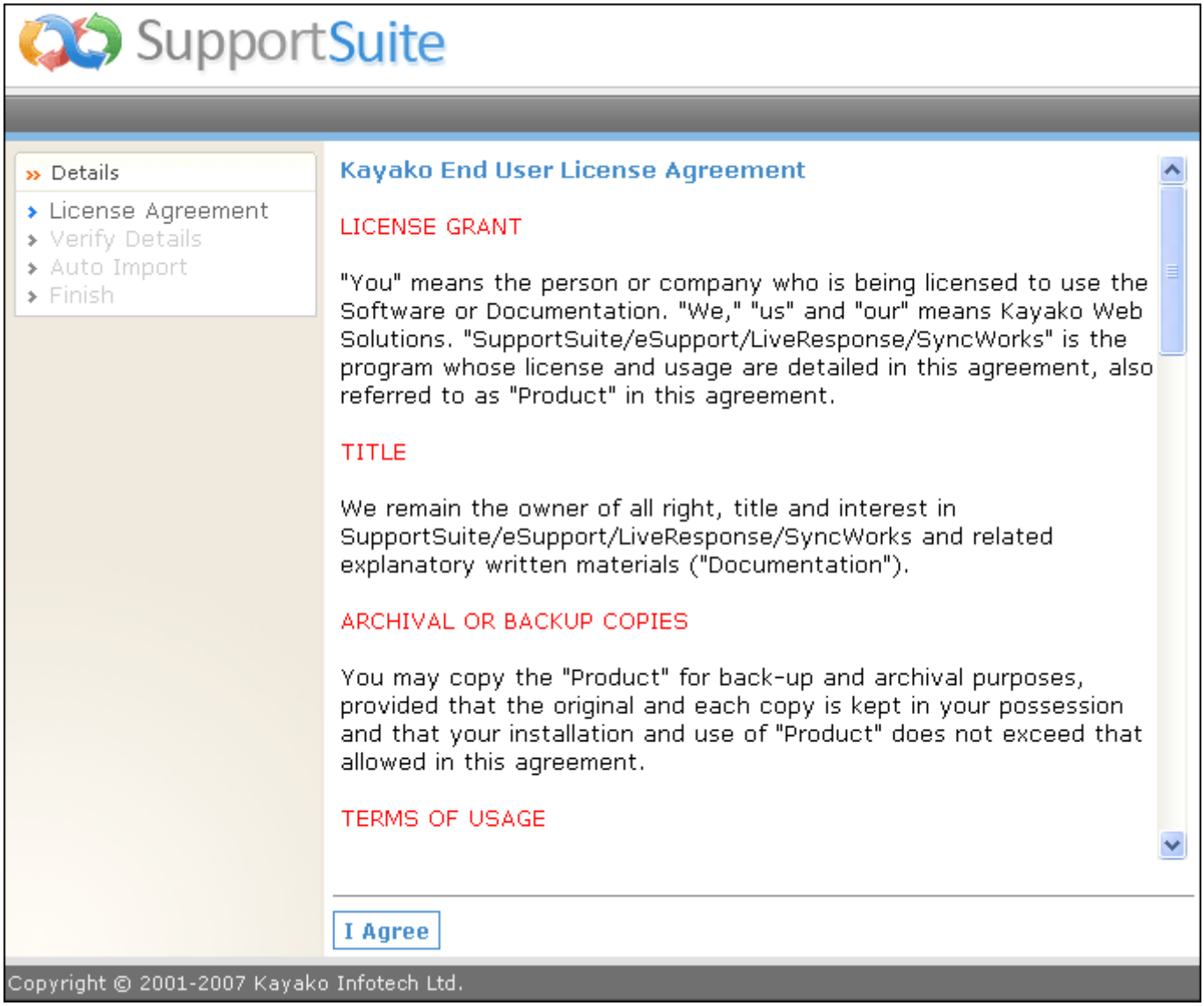
SupportSuite
Details
License Agreement
Verify Details
Auto Import
Finish
Kayako End User License Agreement
LICENSE GRANT
"You" means the person or company who is being licensed to use the Software or Documentation. "We," "us" and "our" means Kayako Web Solutions. "SupportSuite/eSupport/LiveResponse/SyncWorks" is the program whose license and usage are detailed in this agreement, also referred to as "Product" in this agreement.
TITLE
We remain the owner of all right, title and interest in SupportSuite/eSupport/LiveResponse/SyncWorks and related explanatory written materials ("Documentation").
ARCHIVAL OR BACKUP COPIES
You may copy the "Product" for back-up and archival purposes, provided that the original and each copy is kept in your possession and that your installation and use of "Product" does not exceed that allowed in this agreement.
TERMS OF USAGE
I Agree
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3. Review the license agreement. Click on the **I Agree** button to continue.

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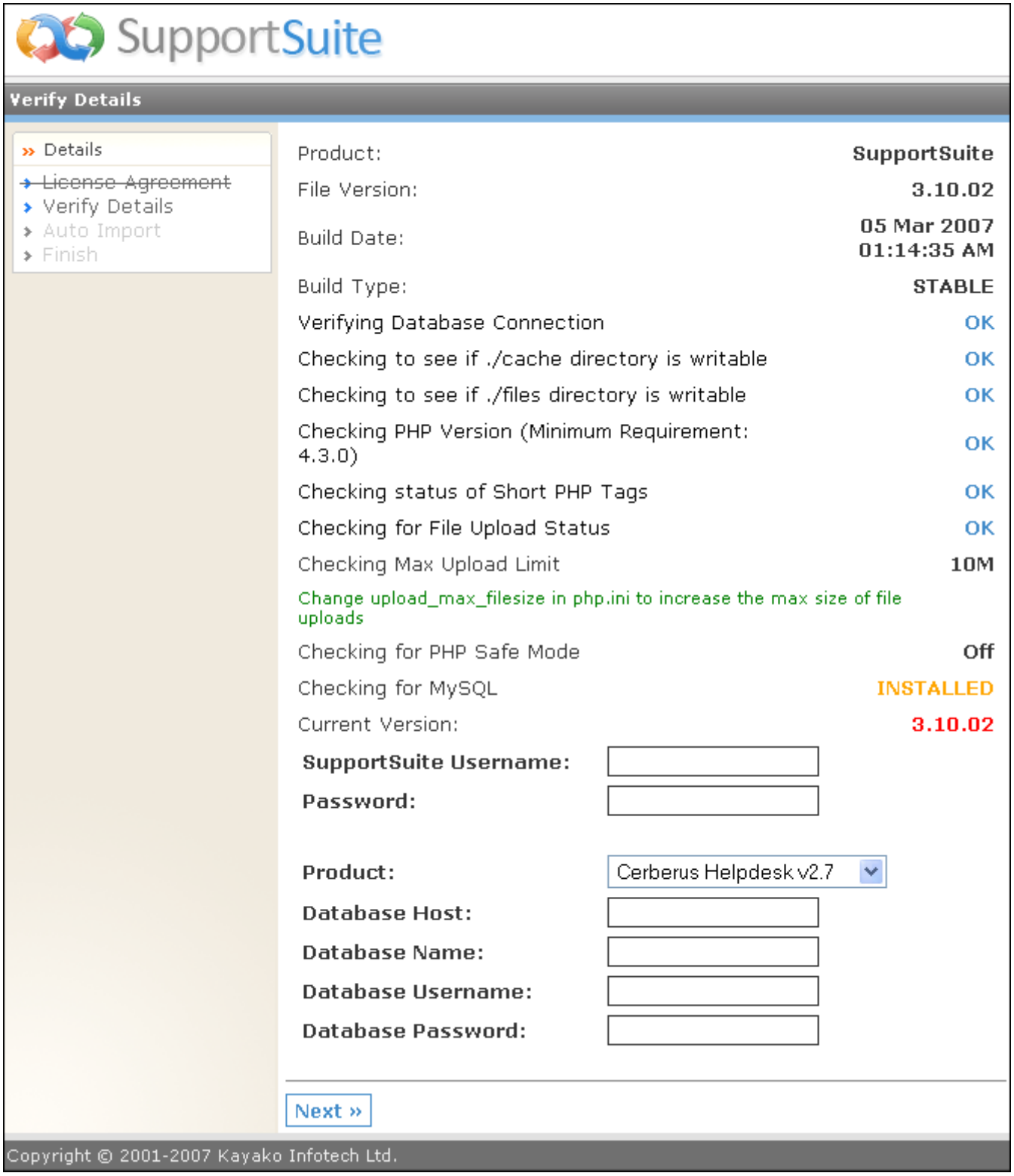

4. Enter your (or a) administrator username and password into the fields as indicated to below. These administrator details must be those created for your **v3 installation**.

    a. Select the product from which you are importing data.

    b. Enter the database host, database name, database username and password. These database details must be for the database that holds your current third party product's

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data.

5. Click on the **Next** button to proceed with the import.

6. On completion, the script shall display the success message 'Import Successful'. You have now successfully imported data from your third party product into your SupportSuite, eSupport or LiveResponse installation.

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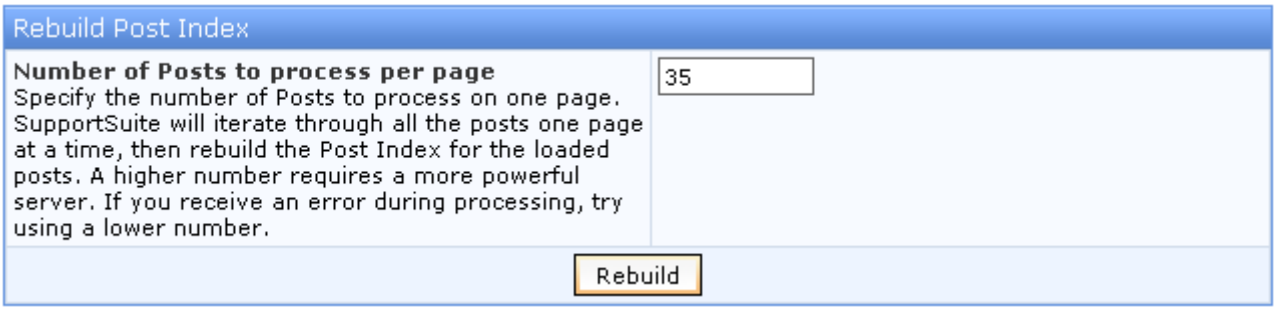
Step three: Rebuild the database indices

Once having imported the data, it is now necessary to rebuild the search database (rebuild the post index). This is necessary for the search features of the software to work correctly.

1. You can rebuild your post index from the administrator control panel by opening the **Tickets** menu.

2. Click on **Maintenance**.


Rebuild Post Index
Number of Posts to process per page
Specify the number of Posts to process on one page. SupportSuite will iterate through all the posts one page at a time, then rebuild the Post Index for the loaded posts. A higher number requires a more powerful server. If you receive an error during processing, try using a lower number.
35
Rebuild

- **Number of Posts to Process Per Page -** Specify the number of posts that the system should process on one page in the adjacent text box.

3. Click on **Rebuild**.

If you receive an error during processing then try using a lower number for the *Number of Posts to Process Per Page*. Since the process is resource intensive, you will require a powerful server to process a higher number of posts in one batch.

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Setting up e-mail piping

An e-mail queue can be created that will handle e-mail that is **piped** into the system (piping is the automatic "pushing" of an e-mail by the server into your installation of SupportSuite or eSupport). This is done by forwarding an e-mail alias to a script within your SupportSuite or eSupport installation. This script will then process the incoming e-mail message.

The difference between piping (e-mail being pushed into the system) and polling (e-mail being fetched into the system):

- Piped e-mail is fairly "instant" (in terms of receiving an e-mail).
- Polled e-mail is fetched every 10 minutes by a **scheduled task** (an automated task) that can only run when a SupportSuite or eSupport page is loaded.

The procedures in this section describe how to set up e-mail piping for an e-mail address alias (such as support@mydomain.com or sales@mydomain.com) under various systems.

Note: Before you proceed to set up e-mail pipes, be sure to change the file permissions for the e-mail pipe script otherwise your e-mail piping will fail.

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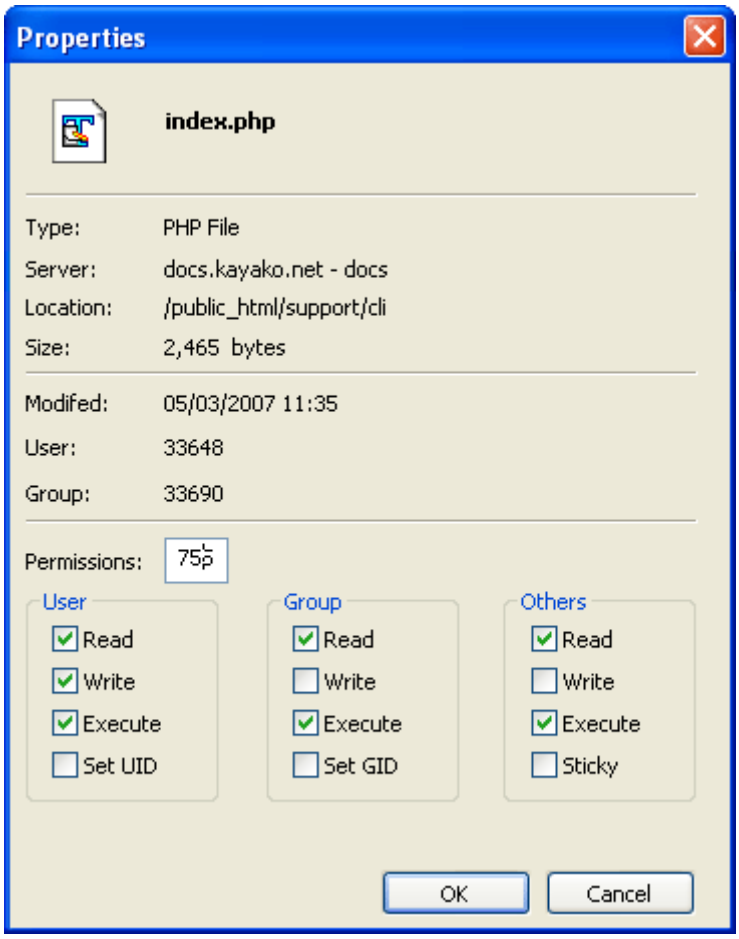
Changing the file permissions

The file **index.php**, located in the **/cli/** folder needs to be made executable by external scripts.

As previously, this guide will use the SmartFTP (www.smartftp.com) client to perform the file permission changes. However, most FTP clients are very much similar to each other, so differences in procedures should be few.

1. In your FTP client, browse to the location to which you have uploaded the software files.
2. Browse to the **/cli/** folder.
3. Right click on the **index.php** file inside of the **/cli/** folder.
4. Edit the permissions of this file.



5. To make the file executable, we will "CHMOD" the folder to **755** (as shown above).
6. Click on the **OK** button to make the permission changes.

Note that if on a Microsoft Windows server, change the permissions of the file to *Read-Write-Execute*.

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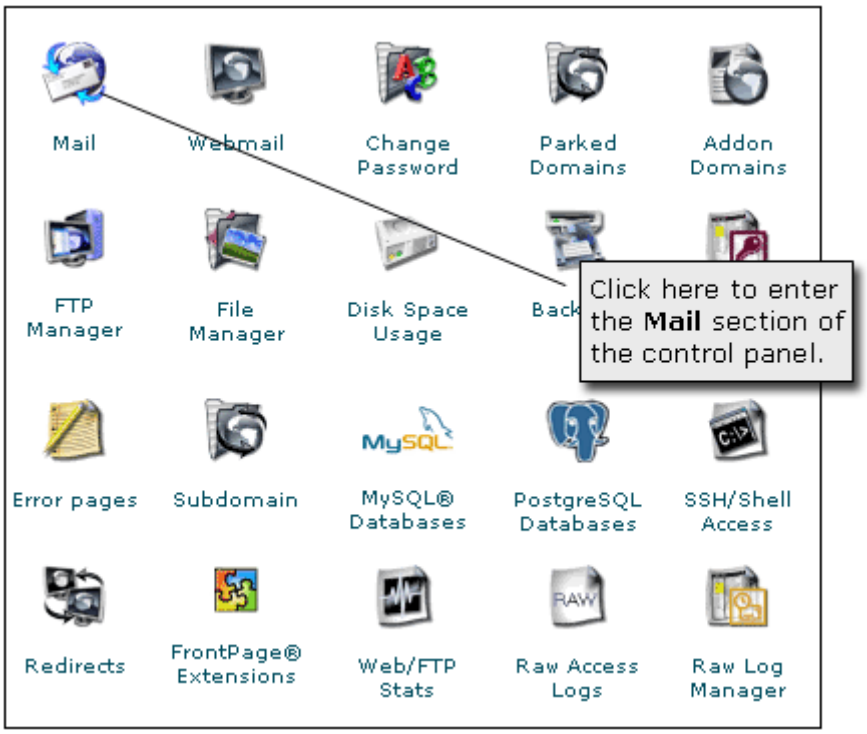
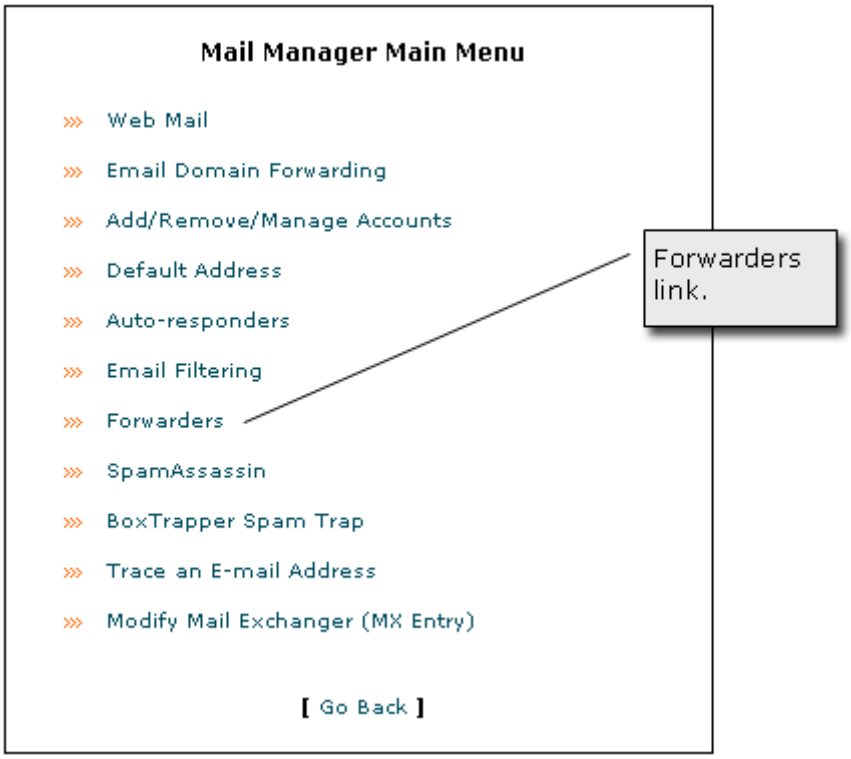
E-mail piping in cPanel

1. Login to your cPanel control panel.
2. From the main menu, select the **Mail** icon.



3. From the **Mail** menu, click on the **Forwarders** link.



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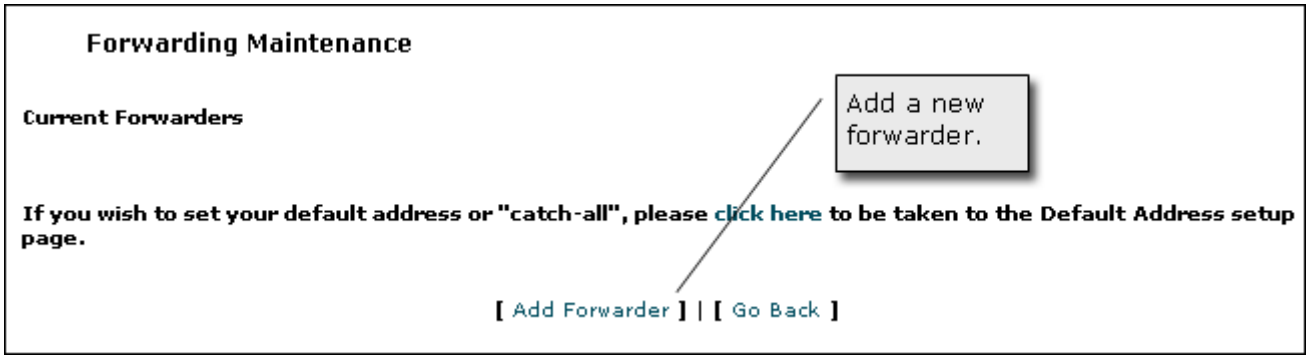
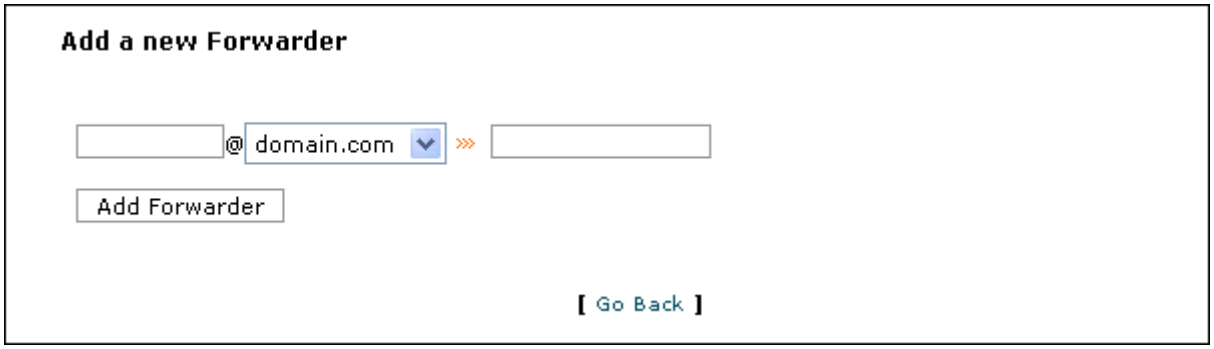
4. Click on **Add Forwarder** to create a new forwarder.


Forwarding Maintenance
Current Forwarders
Add a new forwarder.
If you wish to set your default address or "catch-all", please click here to be taken to the Default Address setup page.
[Add Forwarder] | [Go Back]

5. You will be presented with a series of fields that will allow you to forward an e-mail alias (an alias being the "**support**" in the e-mail address "**support@domain.com**".



6. In the first field, enter the e-mail **alias**. If you wish to create an e-mail forwarder for the address **support@domain.com**, the alias here should be "**support**".
7. In the third field, enter the location to which you want to forward incoming mail to.
8. This location has to be the pipe command to the **absolute path** of the location of your **../cli/index.php** file (the file that accepts incoming e-mail pipes).
9. Normally in cPanel, the **absolute path** looks similar to this:
    a. /home/your_cpanel_username/public_html/*path_to_your_installation*/cli/index.php
    b. I.e. /full/path/to/cli/index.php
10. We will assume here that this path **is** the absolute path to your /cli/index.php location.
11. In the third field, enter the text (including quotes):
    a. "|/home/your_cpanel_username/public_html/path_to_your_installation/cli/index.php"
12. This command will pipe | incoming e-mails to the specified location.
13. Click on the **Add Forwarder** button to add the e-mail forwarder.

You have now configured e-mail piping to your SupportSuite or eSupport system. Now you must ensure you have created an e-mail queue within the administrator control panel so that the mail

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parser will accept the incoming e-mail messages. For more information, see mail parser in the administrator control panel.

If you find you are having issues getting e-mail piping to work, check the following things in order:

1. That you have the e-mail queue set up in the administrator control panel set up to parse e-mail coming into the e-mail address you have set up piping for.
2. That the /cli/index.php file has the correct file permissions.
3. That you have entered the correct absolute path to /cli/index.php as the location of which to pipe to.
4. That the pipe command is enclosed in quotation marks ("|/full/path/to/cli/index.php").
5. Try adding **php –q** to the pipe command, so the location to which the e-mail alias is forwarded to becomes:
    a. "| php-q /full/path/to/cli/index.php"

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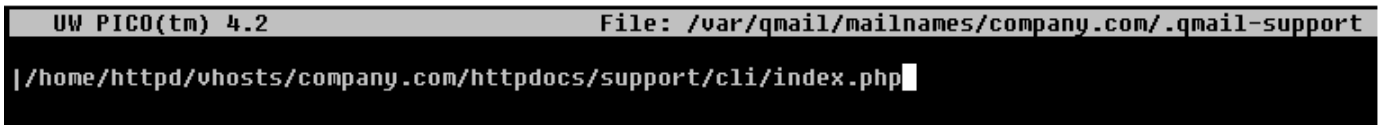
E-mail piping in Plesk Control Panel

This procedure explains how to set up e-mail piping in the Plesk Control Panel.

1. Via SSH, you need to manually edit the file:
    a. /var/qmail/mailnames/***company.com***/.qmail-***support***
    b. Where **support** is the e-mail alias name (support@yourdomain.com).
2. The **.qmail-support** is the name of the file we are editing, and in it we will place the pipe command.



3. Inside this file, the following command needs to be entered:
    a. "|/home/httpd/vhosts/***company.com***/httpdocs/full/path/to/cli/index.php"
4. This command will pipe | incoming e-mails to the specified location.
5. Save the file.

You have now configured e-mail piping to your SupportSuite or eSupport system. Now you must ensure you have created an e-mail queue within the administrator control panel so that the mail parser will accept the incoming e-mail messages. For more information, see mail parser in the administrator control panel.

If you find you are having issues getting e-mail piping to work, check the following things in order:

1. That you have the e-mail queue set up in the administrator control panel set up to parse e-mail coming into the e-mail address you have set up piping for.
2. That the /cli/index.php file has the correct file permissions.
3. That you have entered the correct absolute path to /cli/index.php as the location of which to pipe to.
4. That the pipe command is enclosed in quotation marks ("|/home/httpd/vhosts/yourdomain.com/httpdocs/full/path/to/cli/index.php").
5. Try adding **php –q** to the pipe command, so the location to which the e-mail alias is forwarded to becomes:
    a. "| php-q /home/httpd/vhosts/company.com/httpdocs/full/path/to/cli/index.php"

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E-mail piping using Unix mail transport agents

Qmail

This procedure explains how to set up e-mail piping manually using the Qmail mail transport system.

1. Via SSH, you need to manually edit the file:
    a. /var/qmail/mailnames/***company.com***/.qmail-***support***
    b. Where **support** is the e-mail alias name (support@yourdomain.com).
2. The **.qmail-support** is the name of the file we are editing, and in it we will place the pipe command.

3. Inside this file, the following command needs to be entered:
    c. "|/home/httpd/vhosts/***company.com***/httpdocs/full/path/to/cli/index.php"
4. This command will pipe | incoming e-mails to the specified location.
5. Save the file.

You have now configured e-mail piping to your SupportSuite or eSupport system. Now you must ensure you have created an e-mail queue within the administrator control panel so that the mail parser will accept the incoming e-mail messages. For more information, see mail parser in the administrator control panel.

If you find you are having issues getting e-mail piping to work, check the following things in order:

1. That you have the e-mail queue set up in the administrator control panel set up to parse e-mail coming into the e-mail address you have set up piping for.
2. That the /cli/index.php file has the correct file permissions.
3. That you have entered the correct absolute path to /cli/index.php as the location of which to pipe to.
4. That the pipe command is enclosed in quotation marks ("|/home/httpd/vhosts/company.com/httpdocs/full/path/to/cli/index.php").
5. Try adding **php –q** to the pipe command, so the location to which the e-mail alias is forwarded to becomes:
    b. "| php-q /home/httpd/vhosts/company.com/httpdocs/full/path/to/cli/index.php"

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EXIM

This procedure explains how to set up e-mail piping manually using the EXIM mail transport system.

1. Open the aliases file for editing:
    a. /etc/valiases/***company.com***
2. Assuming that we creating aliases for the e-mail addresses **sales**@company.com and **support**@company.com, we will create the corresponding entries in the aliases file as follows:
    a. support@company.com: "|/full/path/to/cli/index.php"
    b. sales@company.com: "|/full/path/to/cli/index.php"
3. Once the aliases file has been edited and saved, you will need to execute the **newaliases** command.

```
[root@dev root]# newaliases
/etc/aliases: 63 aliases, longest 10 bytes, 625 bytes total
[root@dev root]#
```

You have now configured e-mail piping to your SupportSuite or eSupport system. Now you must ensure you have created an e-mail queue within the administrator control panel so that the mail parser will accept the incoming e-mail messages. For more information, see mail parser in the administrator control panel.

If you find you are having issues getting e-mail piping to work, check the following things in order:

1. That you have the e-mail queue set up in the administrator control panel set up to parse e-mail coming into the e-mail address you have set up piping for.
2. That the /cli/index.php file has the correct file permissions.
3. That you have entered the correct absolute path to /cli/index.php as the location of which to pipe to.
4. That the pipe command is enclosed in quotation marks ("|/full/path/to/cli/index.php").
5. Try adding **php –q** to the pipe command, so the location to which the e-mail alias is forwarded to becomes:
    a. "| php-q /full/path/to/cli/index.php"

Sendmail

This procedure explains how to set up e-mail piping manually using the Sendmail mail transport system.

1. Open the aliases file for editing:

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a. /etc/aliases

2. Assuming that we creating aliases for the e-mail addresses **sales**@company.com and **support**@company.com, we will create the corresponding entries in the aliases file as follows:

   a. support@company.com: "|/full/path/to/cli/index.php"

   b. sales@company.com: "|/full/path/to/cli/index.php"

```
# trap decode to catch security attacks
decode:         root

# Person who should get root's mail
#root:          marc

support@company.com: "|/full/path/to/cli/index.php"
sales@company.com: "|/full/path/to/cli/index.php"
```

Note: This file may contain other entries for describing the routing of mail aliases in your system. You should not edit any of these entries.

You have now configured e-mail piping to your SupportSuite or eSupport system. Now you must ensure you have created an e-mail queue within the administrator control panel so that the mail parser will accept the incoming e-mail messages. For more information, see mail parser in the administrator control panel.

If you find you are having issues getting e-mail piping to work, check the following things in order:

1. Check to see if your issue is related to SMRSH (see SMRSH instructions).
2. That you have the e-mail queue set up in the administrator control panel set up to parse e-mail coming into the e-mail address you have set up piping for.
3. That the /cli/index.php file has the correct file permissions.
4. That you have entered the correct absolute path to /cli/index.php as the location of which to pipe to.
5. That the pipe command is enclosed in quotation marks ("|/full/path/to/cli/index.php").
6. Try adding **php –q** to the pipe command, so the location to which the e-mail alias is forwarded to becomes:

   a. "| php-q /full/path/to/cli/index.php"

Once the aliases file has been edited and saved, you will need to execute the **newaliases** command.

SMRSH Instructions

Certain Sendmail systems are configured with **Sendmail Restricted Shell** enabled to prevent the execution of any malicious programs or scripts. If you receive a bounce message with detailing a SMRSH failure, then you will need to configure the mail parser with SMRSH in the following way:

1. Find the SMRSH path, run the command **man smrsh** as shown below.

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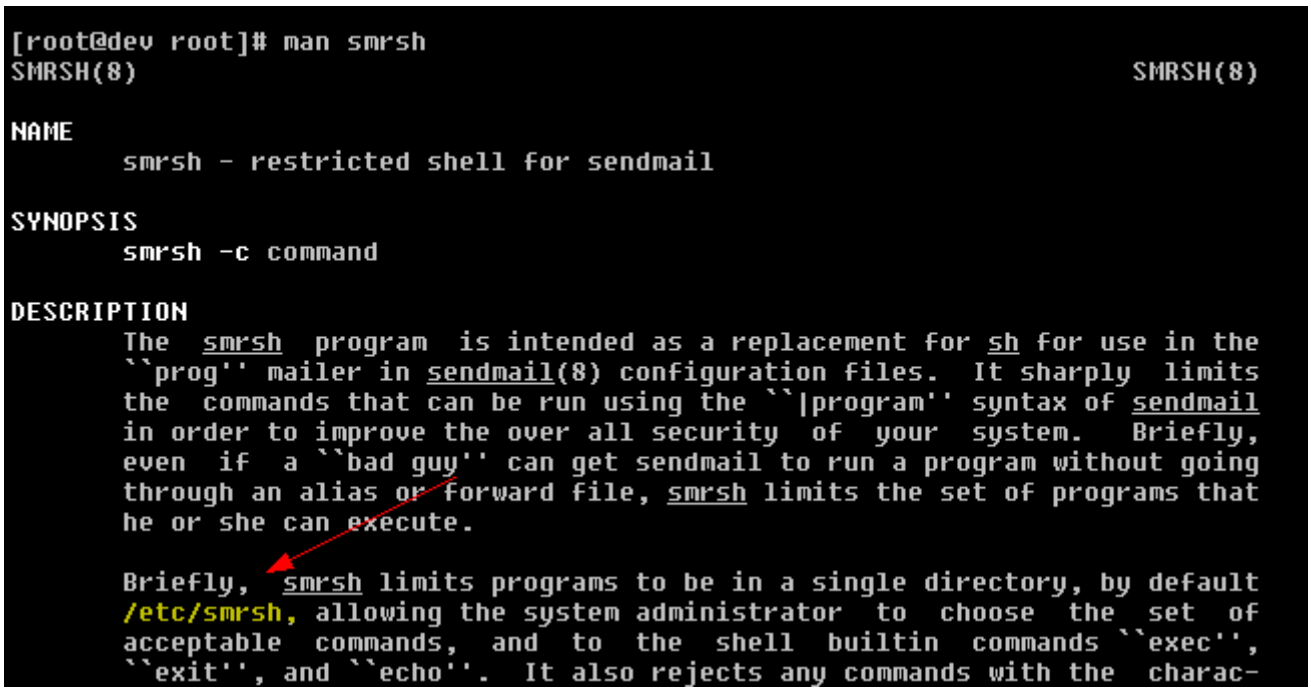
[root@dev root]# man smrsh
SMRSH(8) SMRSH(8)
NAME
smrsh - restricted shell for sendmail
SYNOPSIS
smrsh -c command
DESCRIPTION
The smrsh program is intended as a replacement for sh for use in the ``prog'' mailer in sendmail(8) configuration files. It sharply limits the commands that can be run using the ``|program'' syntax of sendmail in order to improve the over all security of your system. Briefly, even if a ``bad guy'' can get sendmail to run a program without going through an alias or forward file, smrsh limits the set of programs that he or she can execute.
Briefly, smrsh limits programs to be in a single directory, by default /etc/smrsh, allowing the system administrator to choose the set of acceptable commands, and to the shell builtin commands ``exec'', ``exit'', and ``echo''. It also rejects any commands with the charac-

2. The path to SMRSH is listed in the second paragraph. Through the information displayed after executing this command, we now know that SMRSH files should go under **/etc/smrsh**.
3. We will now need to create a **symlink** to our /cli/index.php under the directory **/etc/smrsh**.
4. The command syntax is:
    a. ln –s /full/path/to/cli/index.php /etc/smrsh/index.php

```
[root@dev root]# ln -s /home/www/public_html/cli/index.php /etc/smrsh/index.php
[root@dev root]#
```

5. Once the **symlink** has been created, you should change the alias file contents as follows:
    a. **From:** support@domain.com: "|/full/path/to/cli/index.php"
    b. **To:** support@domain.com: "|**/etc/smrsh/**index.php"

Once the aliases file has been edited and saved, you will need to execute the **newaliases** command.

```
[root@dev root]# newaliases
/etc/aliases: 63 aliases, longest 10 bytes, 625 bytes total
[root@dev root]#
```

Postfix

This procedure explains how to set up e-mail piping manually using the Postfix mail transport system.

1. Open the aliases file for editing:

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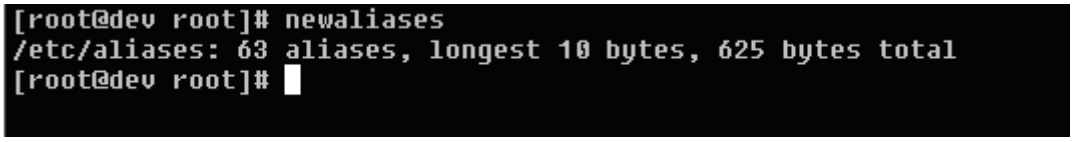
a. /etc/postfix/aliases

2. Assuming that we creating aliases for the e-mail addresses **sales**@company.com and **support**@company.com, we will create the corresponding entries in the aliases file as follows:

   a. support@company.com: "|/full/path/to/cli/index.php"

   b. sales@company.com: "|/full/path/to/cli/index.php"

3. Once the aliases file has been edited and saved, you will need to execute the **newaliases** command.



You have now configured e-mail piping to your SupportSuite or eSupport system. Now you must ensure you have created an e-mail queue within the administrator control panel so that the mail parser will accept the incoming e-mail messages. For more information, see mail parser in the administrator control panel.

If you find you are having issues getting e-mail piping to work, check the following things in order:

1. That you have the e-mail queue set up in the administrator control panel set up to parse e-mail coming into the e-mail address you have set up piping for.

2. That the /cli/index.php file has the correct file permissions.

3. That you have entered the correct absolute path to /cli/index.php as the location of which to pipe to.

4. That the pipe command is enclosed in quotation marks ("|/full/path/to/cli/index.php").

5. Try adding **php –q** to the pipe command, so the location to which the e-mail alias is forwarded to becomes:

   b. "| php-q /full/path/to/cli/index.php"

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E-mail piping in Windows

This section of the manual has been made up using a number of sources, including contributions made by the community to our user forums.

The guide is not fully supported or guaranteed by Kayako. If you have any questions regarding this guide, please see this thread: http://forums.kayako.com/showthread.php?t=6646.

As there is no native of a stable mail transport (such as EXIM or Postfix) for Microsoft Windows, a work-around must be used.

This procedure briefly explains how to use **Cygwin** (a set of Unix applications ported on Windows and allows to run windows applications from this "linux" environment) and EXIM.

1. We assume that **PHP4** has installed to **C:\PHP4**.
2. We assume that SupportSuite or eSupport has been installed to **D:_htdocs**.
3. Install **Cygwin** (www.cygwin.com). While installing this application, select **EXIM** under the Mail Component and **Python** under the Python component.
4. Set up EXIM by running script **exim-configure**.
5. When asked whether or not EXIM should be installed as a service, answer **Yes**.
6. Make sure that the port **25** is has been opened in the Windows firewall.
7. Download a script called **mimedecode.py** from http://phd.pp.ru/Software/Python and please it in a new directory located at **C:\mimedecode**.
8. In the **C:\mimedecode** directory, create file named **esupport.sh** with the following lines:
    a. #!/bin/sh
    b. cat | /cygdrive/c/mimedecode/mimedecode.py -f utf-8 | /cygdrive/c/php4/php.exe d:/_htdocs/cli/index.php
9. Change the file permissions of **esupport.sh** to **755** using the command:
    a. chmod 755 /cygdrive/c/mimedecode/esupport.sh
10. Edit the file **/etc/aliases** (located in **c:\cygwin\etc\aliases**) and enter the following lines (for example):
    a. postmaster: hostmaster@company.com
    b. support: "| /cygdrive/c/mimedecode/esupport.sh"
11. This will pipe the alias **support@yourdomain.com** to the file **esupport.sh**.
12. Execute the command **newaliases** to rebuild the aliases table.

You have now configured e-mail piping to your SupportSuite or eSupport system. Now you must ensure you have created an e-mail queue within the administrator control panel so that the mail

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parser will accept the incoming e-mail messages. For more information, see mail parser in the administrator control panel.

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Setting up cron jobs (automated scheduled tasks)

A cron job is a system-side automatic task that can be configured to run for an infinite number of times at a given interval.

System-side cron jobs can be used to keep the SupportSuite, eSupport and LiveResponse "fresh".

SupportSuite, eSupport and LiveResponse operate an internal cron system which performs things such as POP3/IMAP mail fetching every 10 minutes, system cleanups and follow-up ticket actions. You can see a list of the tasks scheduled in the internal cron system in scheduled tasks in the administrator control panel).

However, this internal cron system cannot continuously run and execute by itself. In order for the internal cron system to execute, a page in the client support interface or staff control panel must be loaded. For a busy support desk, the risk of the internal cron system going stagnant is low.

However, if your support desk is not busy and you use POP3/IMAP e-mail fetching, it is highly recommended you set up a system-side cron job to frequently load the **/cron/index.php** page in your SupportSuite, eSupport or LiveResponse installation.

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Cron jobs in cPanel

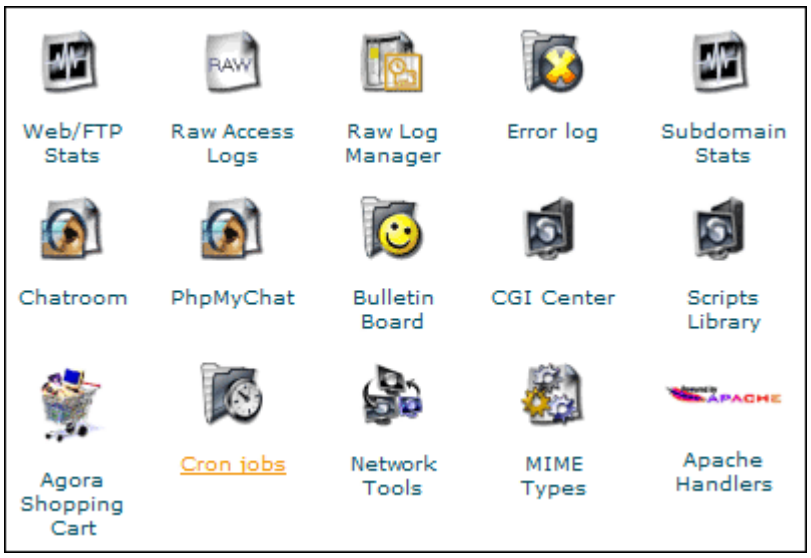
The following procedure explains how to set up a scheduled task using the cPanel Control Panel.

The scheduled task that we will set up will execute the **wget** command to load the **/cron/index.php** page that will run the SupportSuite, eSupport or LiveResponse internal cron system to perform internally scheduled tasks (such as POP3/IMAP e-mail fetching, cleanups and so on).

This guide assumes that the **wget** command is enabled for your system (which will be by default for Linux and Unix systems, but not for Microsoft Windows system. For installing wget for Microsoft Windows, see using Microsoft Windows Server 2003. The wget command simply "loads" or "fetches" an element (such as a web page).

Step one: Log in to the cPanel control panel

1. Enter your account's username and password.
2. Press the **Login** button.
3. Click on the **Cron Jobs** icon, as shown below.



Step two: Adding a new cron job

1. You will be asked what your level of experience is. This will determine how complex the interface for configuring the cron job will be. For this guide, we will select **Standard**.

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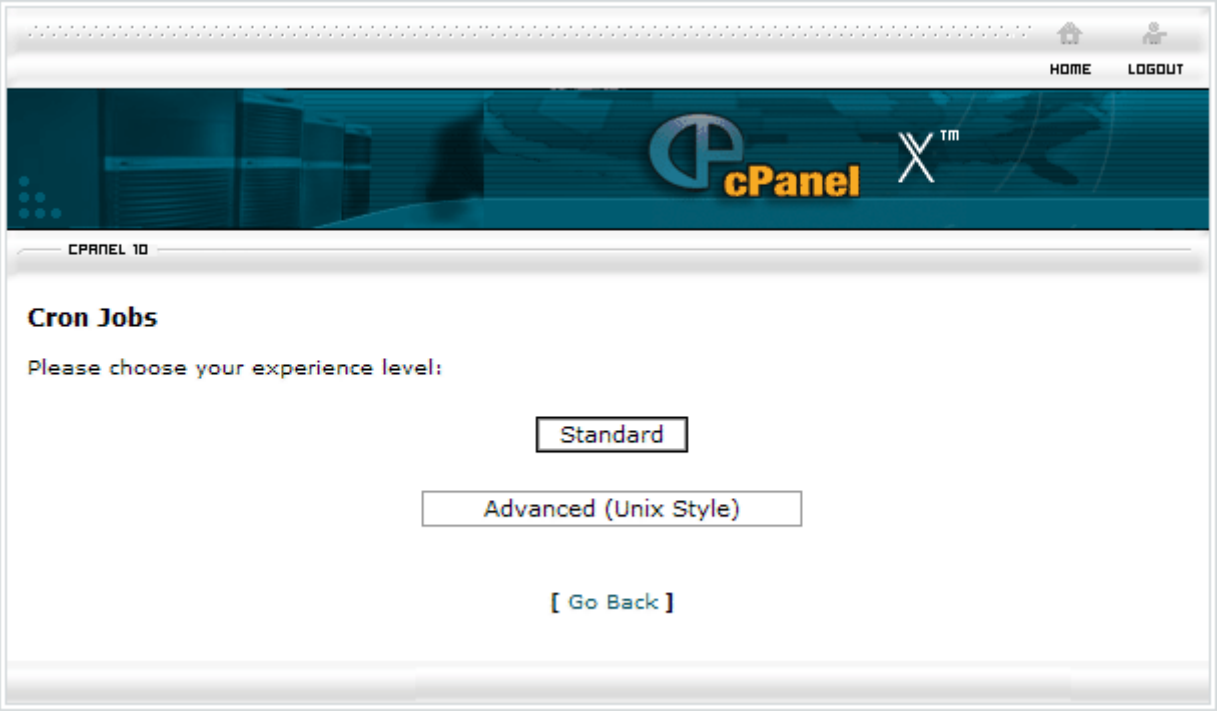

Step three: Configuring the cron job

We will set up this new cron job to run every **five minutes** on every hour of every day of every week of every month.

A value between 5 and 10 minutes is recommended to ensure the internal cron system is run effectively, particularly if you use POP3 and IMAP fetching – if you do not, a bigger interval will suffice.

1. Enter the **e-mail address** to which the cron output will be sent (it is recommended this is left blank, otherwise your inbox could fill up very quickly).

2. Into the command field, enter the command:
   wget -O/dev/null http://www.mydomain.com/support_install/cron/index.php

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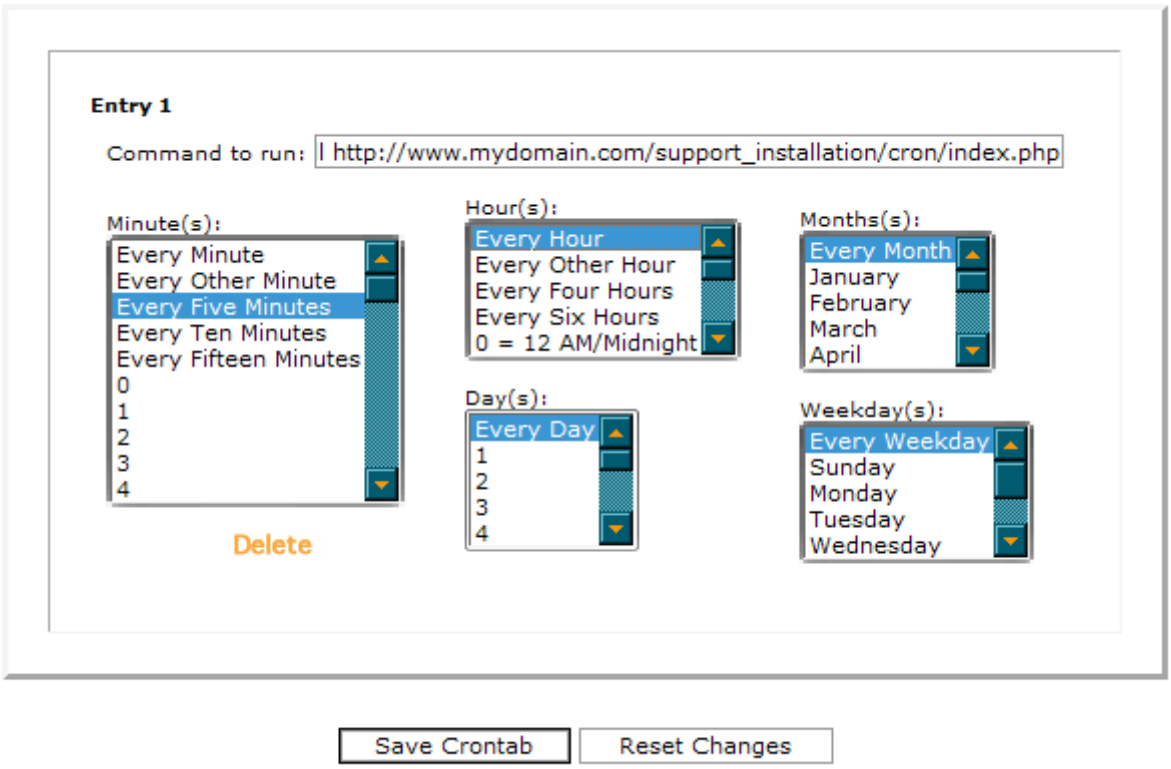

3. Select **Every Five Minutes** under the minutes menu.
4. Select **Every Hour** under the hours menu.
5. Select **Every Day** under the days menu.
6. Select **Every Month** under the months menu.
7. Select **Every Weekday** under the weekdays menu.

Click on the **Save Contrab** button to save and start the scheduled task.

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Cron jobs in Plesk Control Panel

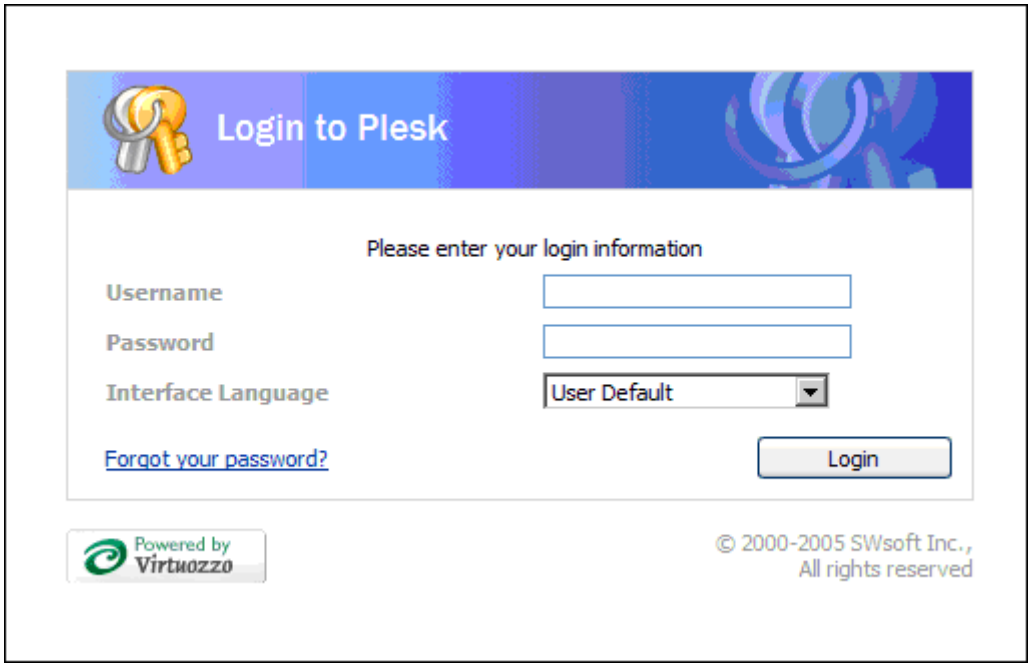
The following procedure explains how to set up a scheduled task using the Plesk Control Panel, version 8.

The scheduled task that we will set up will execute the **wget** command to load the **/cron/index.php** page that will run the SupportSuite, eSupport or LiveResponse internal cron system to perform internally scheduled tasks (such as POP3/IMAP e-mail fetching, cleanups and so on).

This guide assumes that the **wget** command is enabled for your system (which will be by default for Linux and Unix systems, but not for Microsoft Windows system. For installing wget for Microsoft Windows, see using Microsoft Windows Server 2003. The wget command simply "loads" or "fetches" an element (such as a web page).

Step one: Log in to the Plesk control panel

4. Enter your account's username and password.
5. Press the **Login** button.



Step two: Adding a new cron job

1. Select **System** on the left menu.
2. Select **Crontab** from under the Services section.
3. Click on the **Add New Task** icon.

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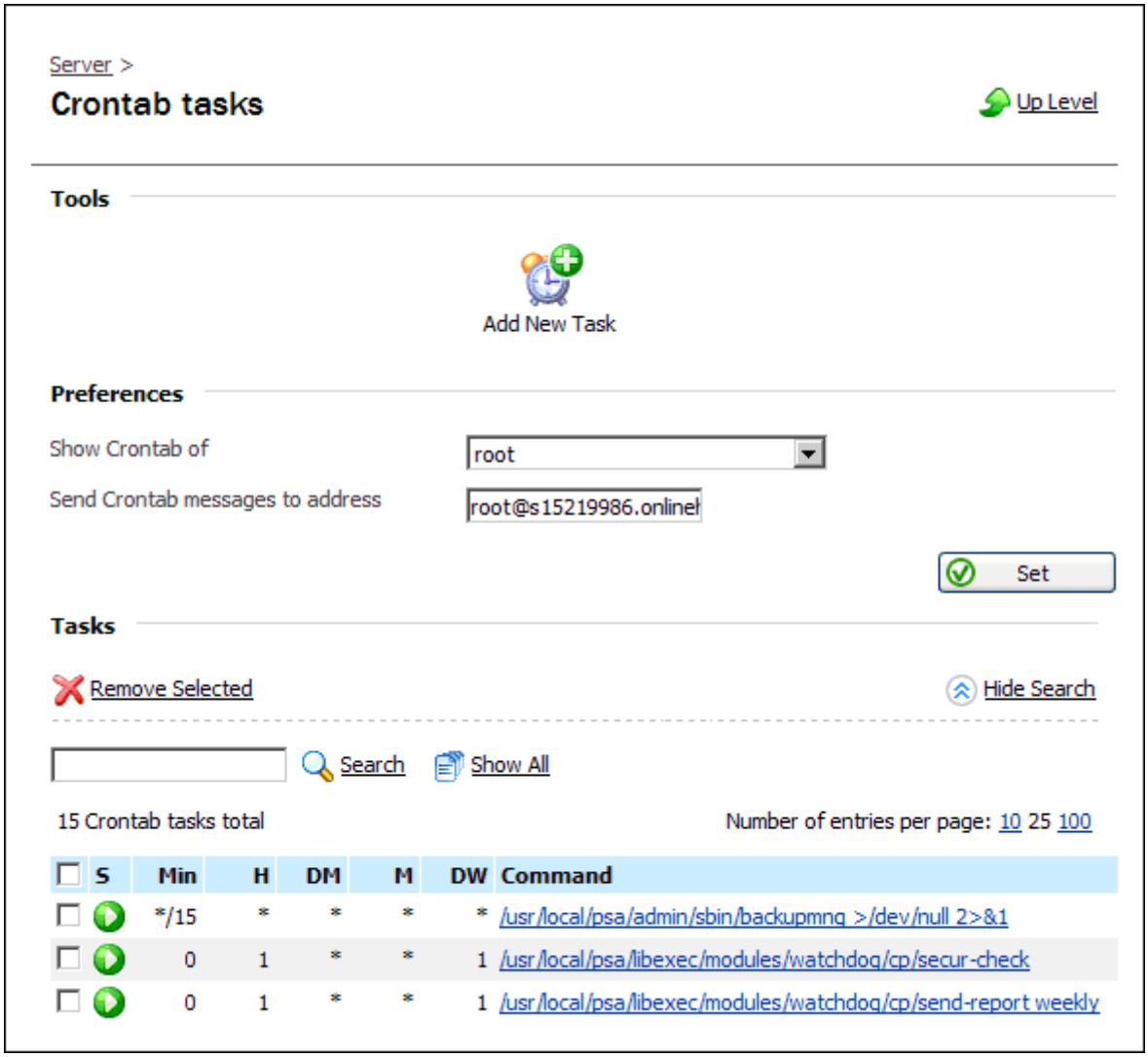

Step three: Configuring the cron job

We will set up this new cron job to run every **five minutes** on every hour of every day of every week of every month.

A value between 5 and 10 minutes is recommended to ensure the internal cron system is run effectively, particularly if you use POP3 and IMAP fetching – if you do not, a bigger interval will suffice.

1. Enter "*/5" into the **Minute** field (this means "every 5 minutes").
2. Enter "*" into the **Hour** fields ("for every hour of the day").
3. Enter "*" into the **Day of the Month** field ("for every day of the month").
4. Enter "*" into the **Month** field ("for every month of the year").
5. Enter "*" into the **Day of the Week** field ("for every day of the week").

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6. Into the command field, enter the command:
   wget -O/dev/null http://www.mydomain.com/support_install/cron/index.php

7. Click on the "OK" button to save the settings.

You can now log out of the control panel as the task will start running automatically.

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Cron jobs in DirectAdmin Control Panel

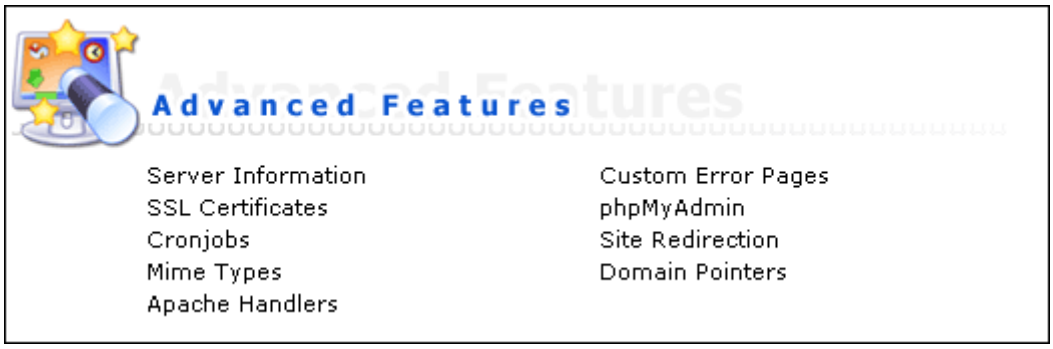
The following procedure explains how to set up a scheduled task using the DirectAdmin Control Panel, version 1.2.

The scheduled task that we will set up will execute the **wget** command to load the **/cron/index.php** page that will run the SupportSuite, eSupport or LiveResponse internal cron system to perform internally scheduled tasks (such as POP3/IMAP e-mail fetching, cleanups and so on).

This guide assumes that the **wget** command is enabled for your system (which will be by default for Linux and Unix systems, but not for Microsoft Windows system. For installing wget for Microsoft Windows, see using Microsoft Windows Server 2003. The wget command simply "loads" or "fetches" an element (such as a web page).

Step one: Log in to the DirectAdmin control panel

1. Enter your account's username and password.
2. Press the **Login** button.
3. Click on the **Cronjobs** icon under the Advanced Features menu, as shown below.



Step two: Adding and configuring a new cron job

We will set up this new cron job to run every **five minutes** on every hour of every day of every week of every month.

A value between 5 and 10 minutes is recommended to ensure the internal cron system is run effectively, particularly if you use POP3 and IMAP fetching – if you do not, a bigger interval will suffice.

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1. Into the command field, enter the command:
   wget -O/dev/null http://www.mydomain.com/support_install/cron/index.php
2. Enter **5** under **Minute** (meaning every 5 minutes).
3. Enter ***** under **Hour** (meaning every hour).
4. Enter ***** under **Day of Month** (meaning every day).
5. Enter ***** under **Month** (meaning every month).
6. Enter ***** under the **Day of Week** (meaning every day of the week).

Click on the **Add** button to save and start the scheduled task.

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Cron jobs (scheduled tasks) Microsoft Windows Server 2003

The following procedure explains how to set up a scheduled task in Microsoft Windows Server 2003.

The scheduled task that we will set up will execute the **wget** command to load the **/cron/index.php** page that will run the SupportSuite, eSupport or LiveResponse internal cron system to perform internally scheduled tasks (such as POP3/IMAP e-mail fetching, cleanups and so on).

The **wget** command is not available in the default installation of Microsoft Windows. To download and set up WGET, please refer to this page: http://xoomer.alice.it/hherold. If you use the this package, copy all of the DLL files to your **C:\WINDOWS\system32** directory. Then, copy the wget.exe file to **C:\WINDOWS**.

There are several other WGET binaries available for Microsoft Windows.

From this point on, we will assume that **wget** is now available on your system.

Step one: Open the task manager

1. Open the **Start Menu** and click on **Control Panel**.
2. From the Control Panel, open up **Scheduled Tasks**.

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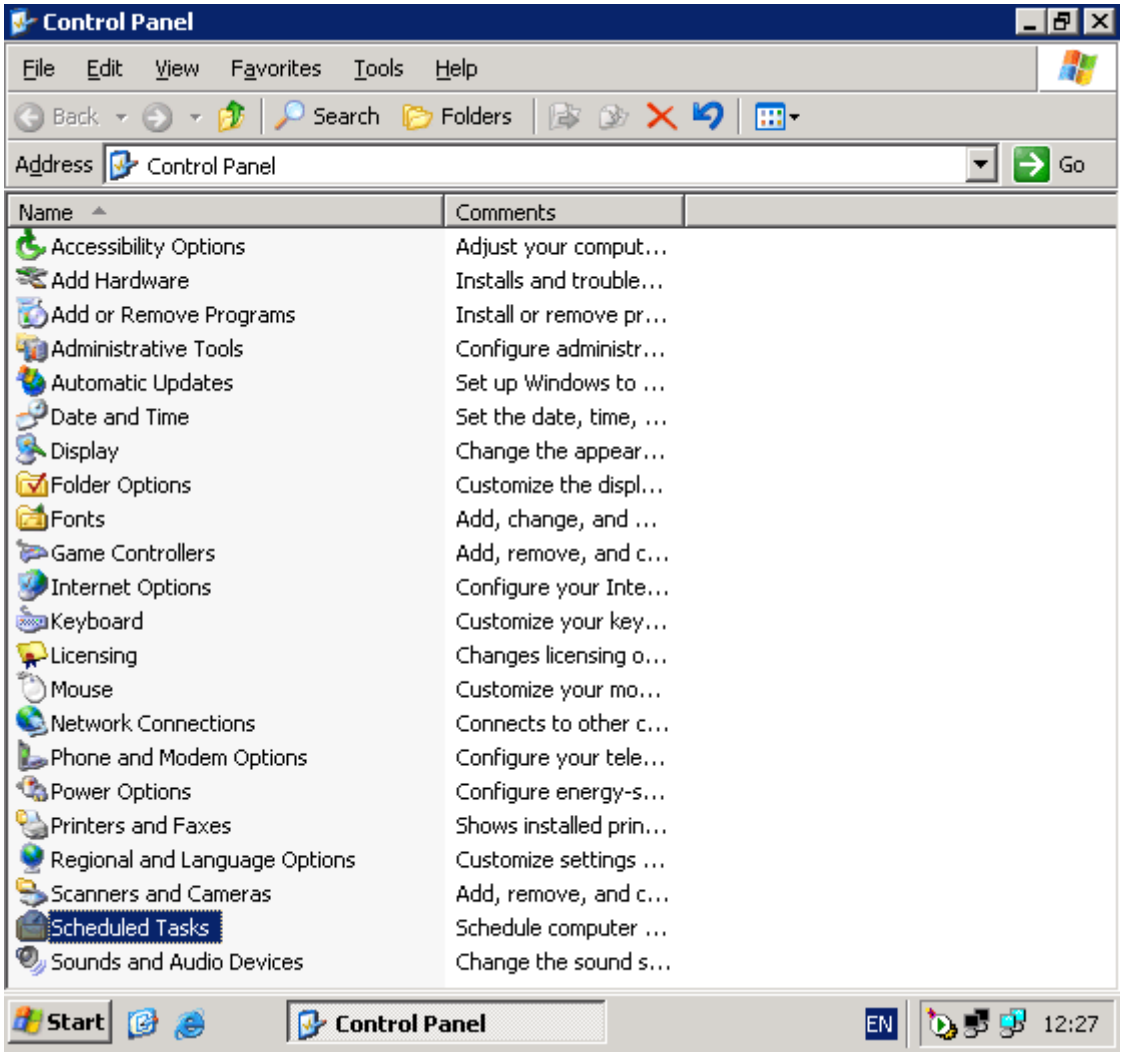

Step two: Create a new scheduled task

1. Right-click in space.
2. Select **New**, followed by **Scheduled Task**.
3. We will name the new task **WGET**.

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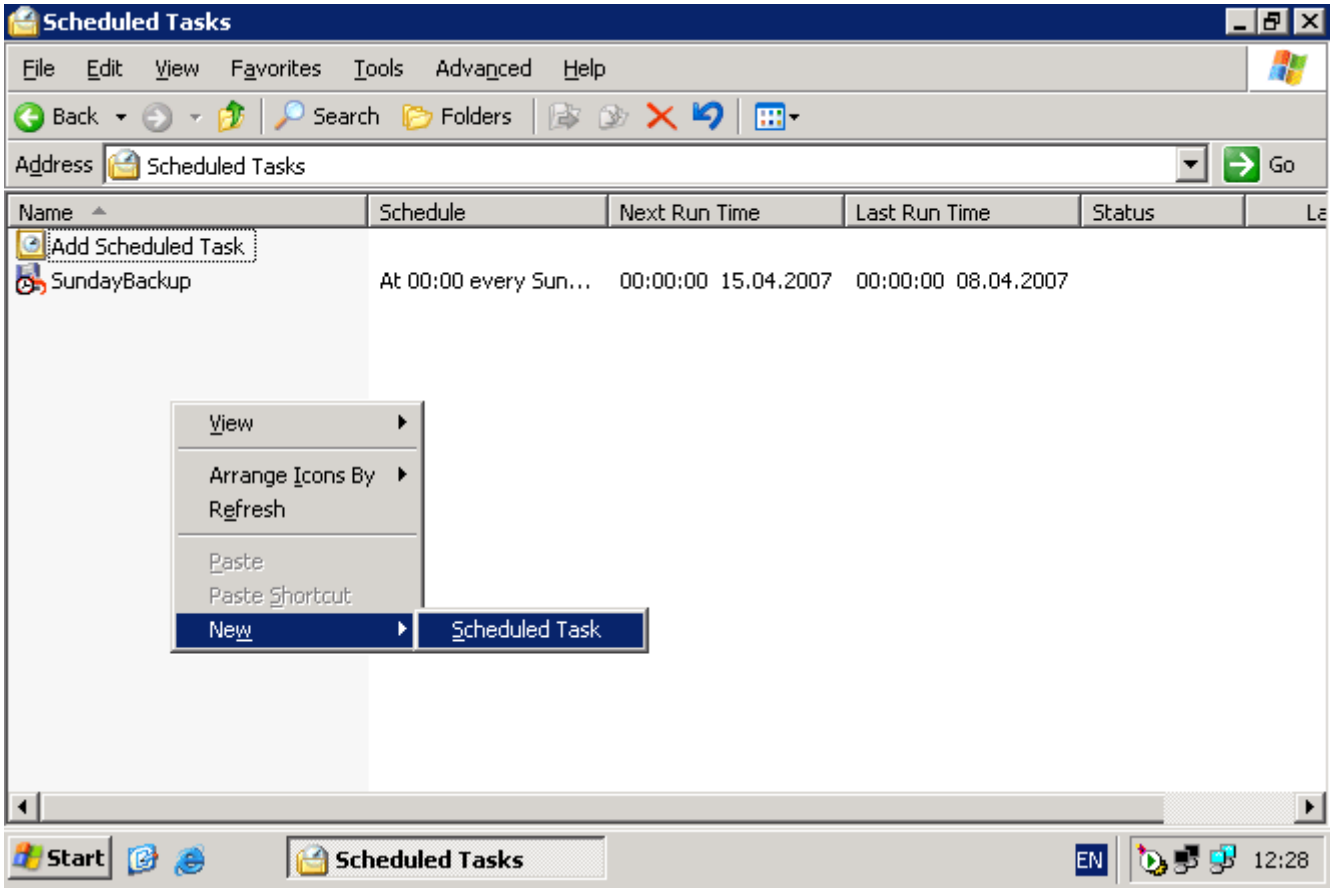

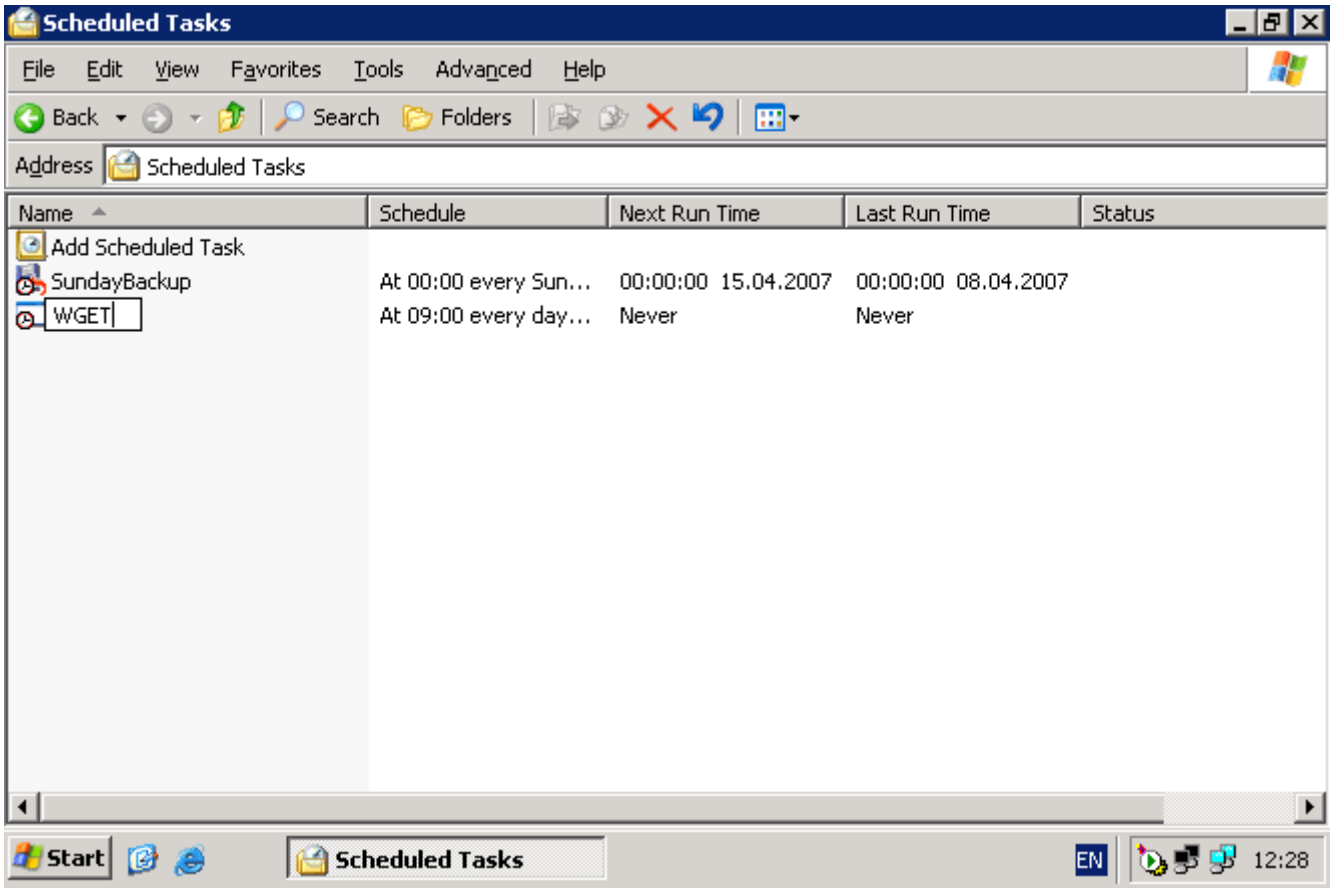
Scheduled Tasks
File Edit View Favorites Tools Advanced Help
Back Search Folders
Address Scheduled Tasks
Name Schedule Next Run Time Last Run Time Status
Add Scheduled Task
SundayBackup At 00:00 every Sun... 00:00:00 15.04.2007 00:00:00 08.04.2007
WGET At 09:00 every day... Never Never
Start
Scheduled Tasks
EN
12:28

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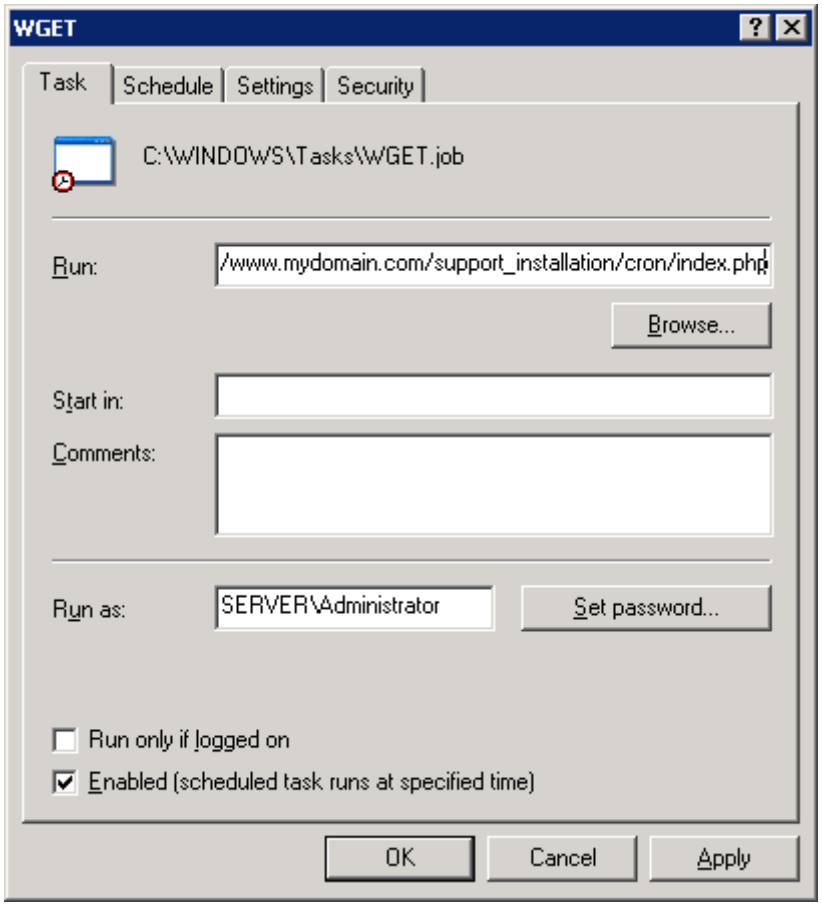
Step four: Configure the scheduled task

1. The command we want the scheduled task to run is:
   C:\WINDOWS\wget.exe -q -O NUL
   http://www.mydomain.com/support_installation/cron/index.php

2. This command will "fetch" the page linked to by the entered URL, causing the SupportSuite, eSupport or LiveResponse internal cron system to cycle.

3. Ensure that the **Enabled** box is checked.



4. Switch to the **Settings** tab.

5. Ensure the settings shown in the diagram below are reflected on your settings window.

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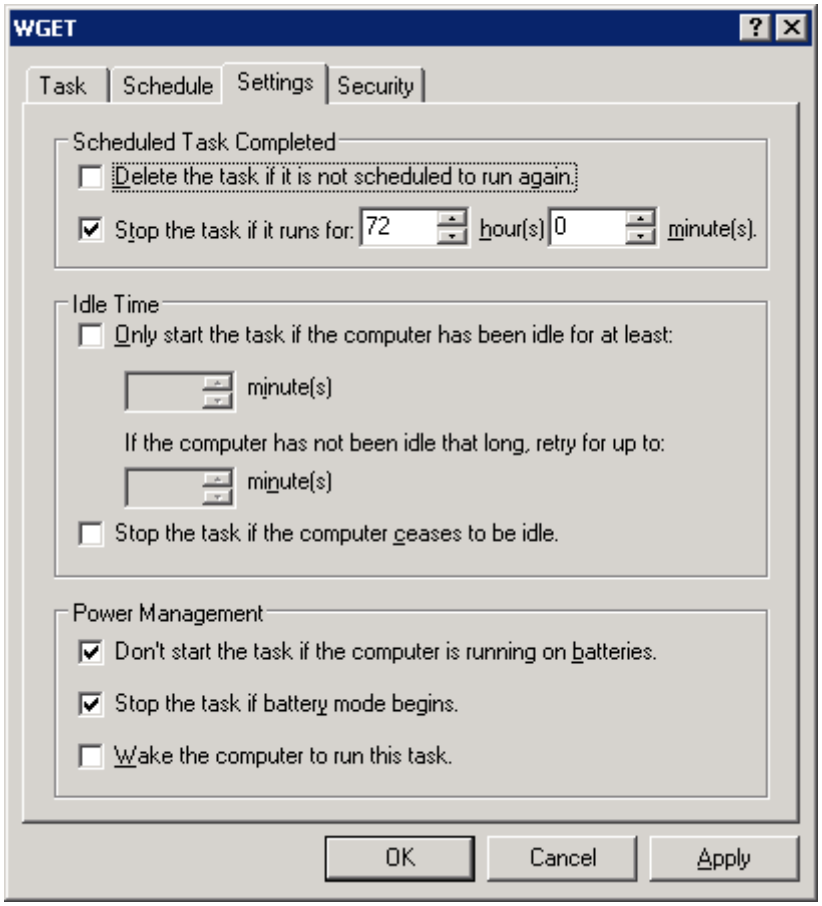
WGET
Task
Schedule
Settings
Security
Scheduled Task Completed
Delete the task if it is not scheduled to run again.
Stop the task if it runs for: 72 hour(s) 0 minute(s).
Idle Time
Only start the task if the computer has been idle for at least:
minute(s)
If the computer has not been idle that long, retry for up to:
minute(s)
Stop the task if the computer ceases to be idle.
Power Management
Don't start the task if the computer is running on batteries.
Stop the task if battery mode begins.
Wake the computer to run this task.
OK
Cancel
Apply

Step five: Set the schedule

1. Switch to the **Schedule** tab.

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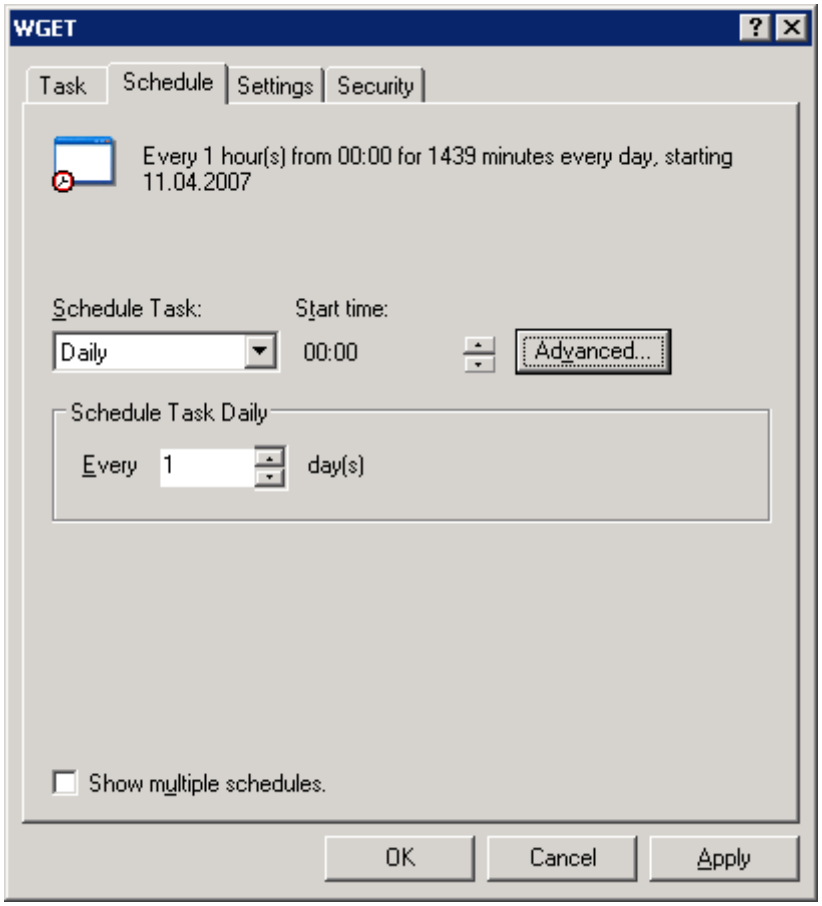
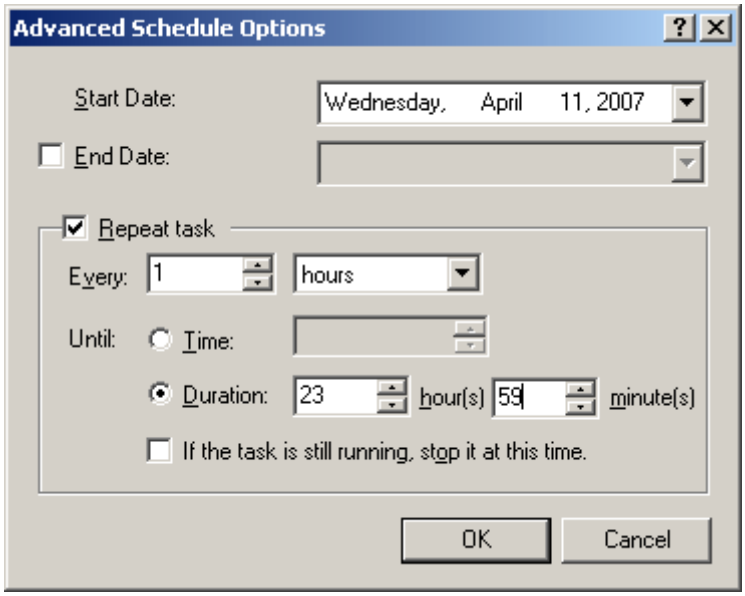


2. To have this task run every day starting at midnight, set the scheduled task to run **Daily** with a start time of **00:00**.

3. Now we will proceed to configure the scheduled task to run repeatedly throughout the day. Click on the **Advanced** button.



4. From here, you can configure how frequently the task should run.

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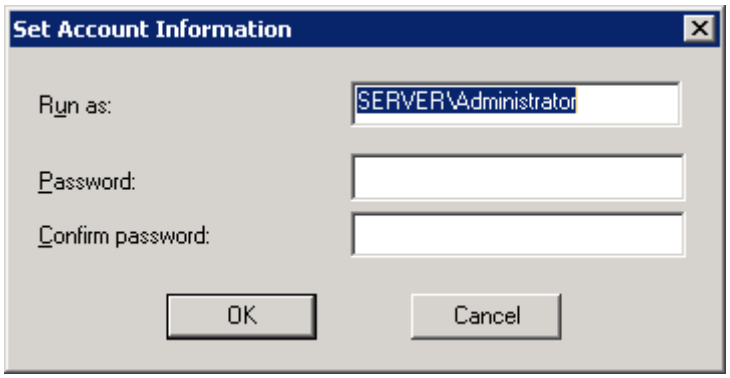
a. A value between 5 and 10 minutes is recommended to ensure the internal cron system is run effectively, particularly if you use POP3 and IMAP fetching – if you do not, a bigger interval will suffice.

b. Set the duration to 23 hours and 59 minutes, as shown above.

5. Click "OK" on all of the dialog boxes to save your configurations. You will be prompted for the username and password for the account under which the task will run. You should enter your default system username and password here.



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Important note: Mail parser (POP3/IMAP e-mail polling) cron setup

As well as a cron job to call **/cron/index.php** to run the internal scheduled tasks, if you wish to regularly trigger the mail parser cron that fetches e-mail from POP3 and IMAP e-mail accounts then you will need to create an **additional** cron task to call **/cron/index.php?_t=parser**. The same procedures described in this section can be followed to achieve this.

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Staff control panel user manual

Staff users typically use the staff control panel to handle the following primary tasks:

- Ticket management.
- User management.
- Downloads management.
- Knowledgebase management.
- Trouble-shooter management.
- News management.
- LiveResponse management.
- Send private messages to other staff.
- Teamwork management.
  - View calendars.
  - Manage contacts.
  - Manage events.
  - Manage tasks.

Much of the staff control panel is permission dependant. Permissions for **staff users** or **staff groups** are managed in the administrator control panel – *not* within the staff control panel.

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Accessing the staff control panel

The staff control panel can be accessed at:
http://www.*yourdomainname*.com/*pathtosupportsuite*/staff

You will be presented with a login form similar to the one shown below.

- **Username** – your staff/admin username.
- **Password** – your staff/admin password.
- **Remember Me** – if enabled, your login details will be 'remembered' using a browser-based cookie.

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Interface quick reference

The interface quick-reference is a visual FAQ (frequently asked question) guide to the most common interfaces of the SupportSuite **staff control panel**.

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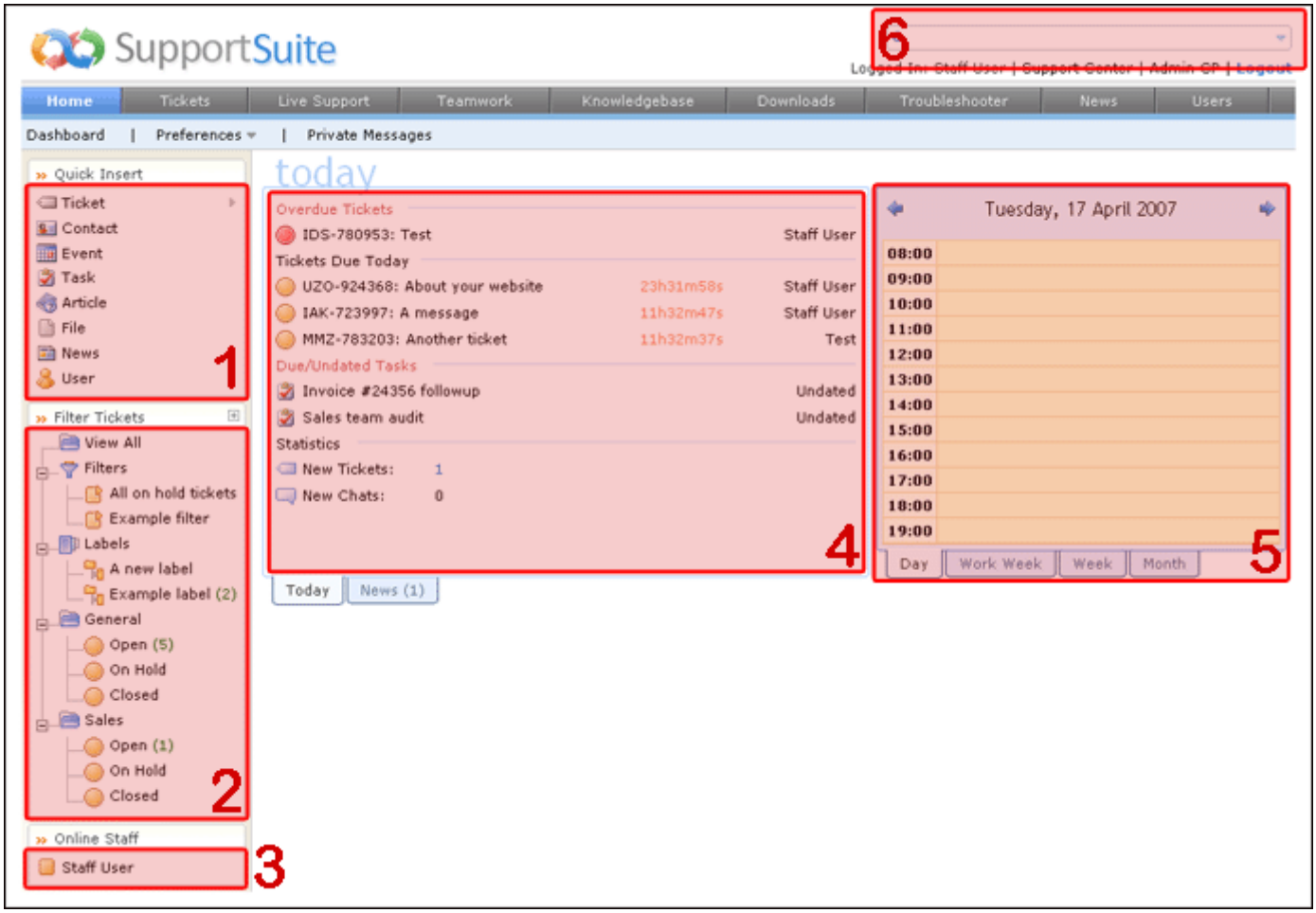
Dashboard



- **1** – the quick-insert menu. From this menu you can quickly insert/create new tickets, contacts, events, tasks, articles, files, news and user accounts.
- **2** – the department and ticket tree (see department and ticket tree). Lists departments, sub-statuses, filters and labels.
- **3** – staff status box. Displays the staff users who are logged into the staff control panel, administrator control panel or LiveResponse Client Application (see staff status).
- **4** – the today overview. Shows overdue tickets, overdue tasks (see tasks), tickets due today and overdue tickets, new tickets since your last visit and new chats.
- **5** – the calendar overview. Shows your current day's events and appointments (see events and appointments) according to your configured work schedule (see work schedule).
- **6 –** the article quick-search box. Type keywords into this box and "wait" – if any matching knowledgebase articles are found they will open up in a list.

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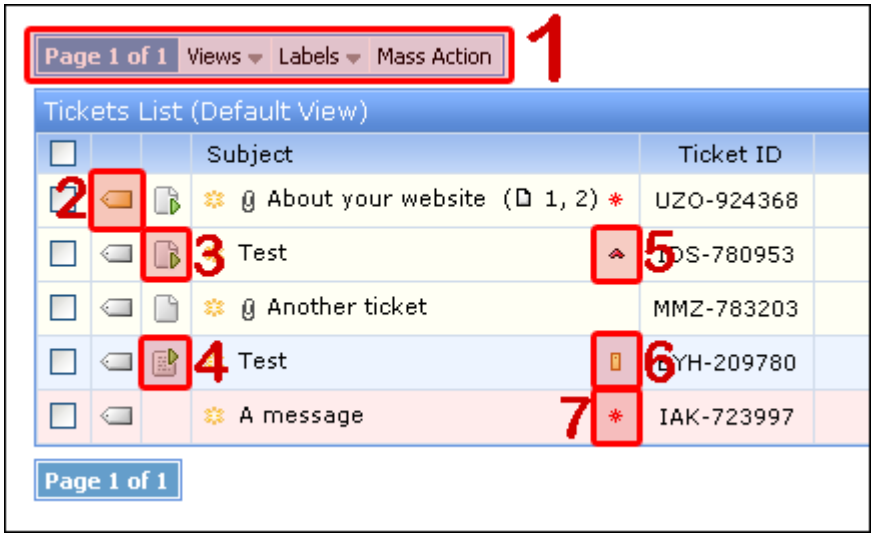
Ticket listing

For clarification, the ticket listing shown below has been split vertically in two.



- **1 –** Change the ticket listing view (see customizing your ticket lists), create a new label (see ticket labels) and open the mass-action menu.
- **2 –** the yellow ticket icon indicates that the ticket has been updated since your last visit. A Gray ticket icon indicates no updates since your last visit.
- **3 –** the note and billing icon shows here if the corresponding ticket has had one or more ticket notes added to it (see ticket and user notes) and a billing entry (see billing information and time tracking) logged.
- **4 –** the billing icon shows here if the corresponding ticket has had a billing entry (see billing information and time tracking) logged.
- **5 –** the escalation icon shows here if the ticket has been escalated, affected by an escalation rule (see escalated tickets).
- **6** – the label icon shows here if the ticket has one or more labels attached to it (see ticket labels).
- **7 –** the assigned * icon shows here if the ticket has been assigned to yourself.

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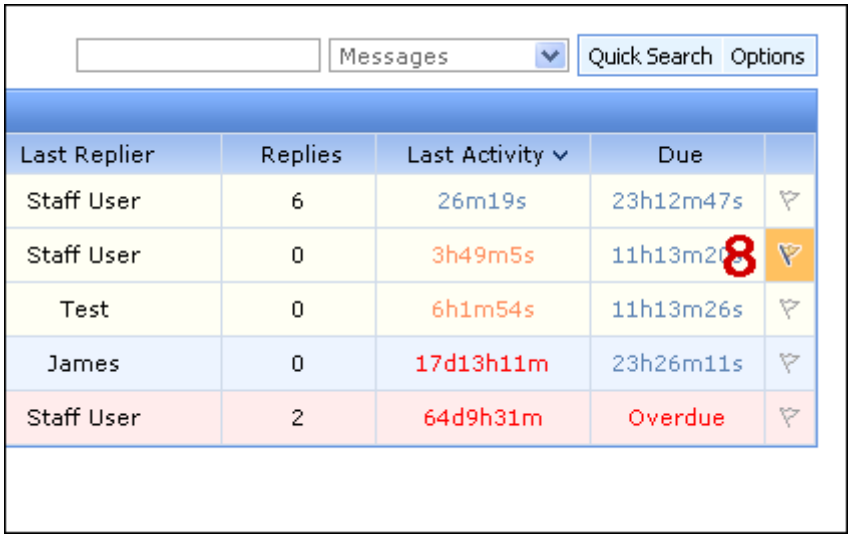

- **8** – the ticket shown here has been flagged (see ticket flags).

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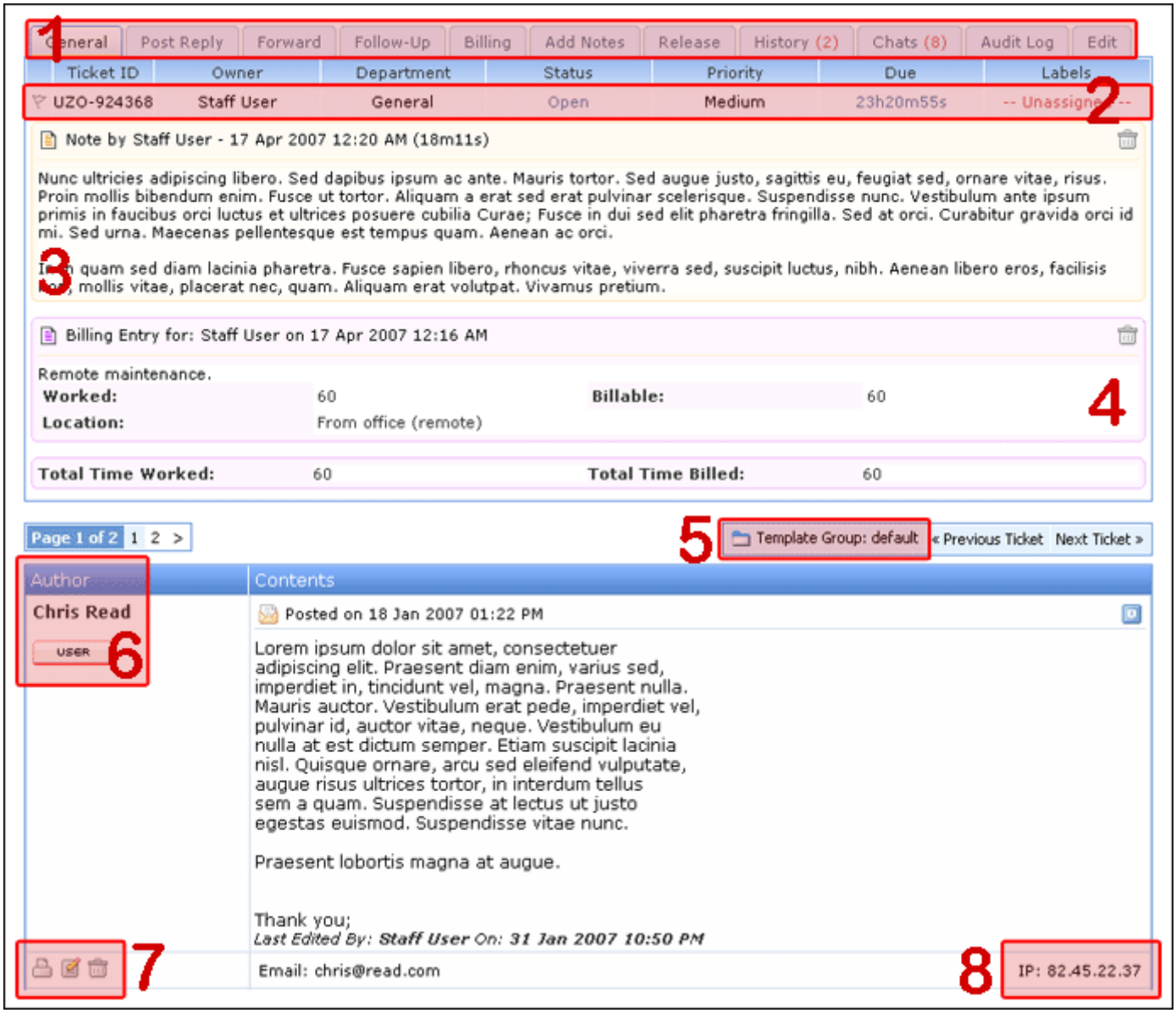
Ticket view


1
General
Post Reply
Forward
Follow-Up
Billing
Add Notes
Release
History (2)
Chats (8)
Audit Log
Edit
Ticket ID
Owner
Department
Status
Priority
Due
Labels
UZO-924368
Staff User
General
Open
Medium
23h20m55s
-- Unassigned --
2
Note by Staff User - 17 Apr 2007 12:20 AM (18m11s)
Nunc ultricies adipiscing libero. Sed dapibus ipsum ac ante. Mauris tortor. Sed augue justo, sagittis eu, feugiat sed, ornare vitae, risus. Proin mollis bibendum enim. Fusce ut tortor. Aliquam a erat sed erat pulvinar scelerisque. Suspendisse nunc. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Fusce in dui sed elit pharetra fringilla. Sed at orci. Curabitur gravida orci id mi. Sed urna. Maecenas pellentesque est tempus quam. Aenean ac orci.
3
quam sed diam lacinia pharetra. Fusce sapien libero, rhoncus vitae, viverra sed, suscipit luctus, nibh. Aenean libero eros, facilisis mollis vitae, placerat nec, quam. Aliquam erat volutpat. Vivamus pretium.
Billing Entry for: Staff User on 17 Apr 2007 12:16 AM
Remote maintenance.
Worked: 60
Billable: 60
Location: From office (remote)
4
Total Time Worked: 60
Total Time Billed: 60
Page 1 of 2 1 2 >
5
Template Group: default
« Previous Ticket
Next Ticket »
Author
Contents
Chris Read
USER
6
Posted on 18 Jan 2007 01:22 PM
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Praesent diam enim, varius sed, imperdiet in, tincidunt vel, magna. Praesent nulla. Mauris auctor. Vestibulum erat pede, imperdiet vel, pulvinar id, auctor vitae, neque. Vestibulum eu nulla at est dictum semper. Etiam suscipit lacinia nisl. Quisque ornare, arcu sed eleifend vulputate, augue risus ultrices tortor, in interdum tellus sem a quam. Suspendisse at lectus ut justo egestas euismod. Suspendisse vitae nunc.
Praesent lobortis magna at augue.
Thank you;
Last Edited By: Staff User On: 31 Jan 2007 10:50 PM
7
Email: chris@read.com
8
IP: 82.45.22.37

- **1 –** the ticket management menu (see ticket management menu).
- **2 –** the ticket information bar (see ticket information bar).
- **3 –** the contents of a ticket note that has been added to the ticket (see ticket and user notes).
- **4 –** the contents of a billing and time tracking entry that has been added to the ticket (see billing information and time tracking).
- **5 –** the template group through which the client user submitted this ticket (see template groups in the administrator control panel).
- **6 –** the ticket replier's name and recipient type (see CC, BCC and third party recipients

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- **7 –** print, edit or delete the ticket reply. When the ticket reply is received by the mail parser, a e-mail headers icon will show. Clicking this will allow you to view the raw e-mail headers for this ticket reply.
- **8 –** the ticket replier's IP address.

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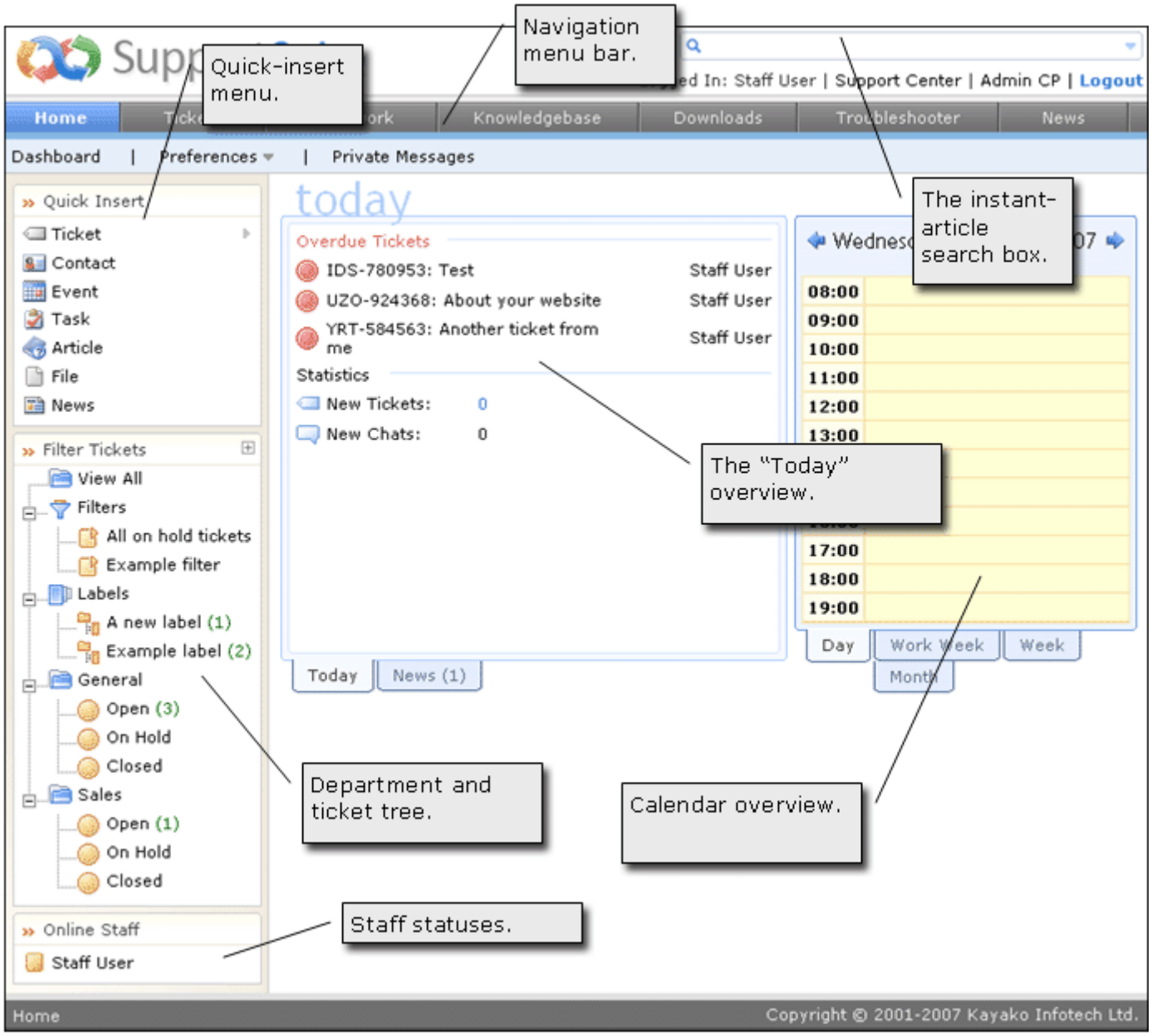
Dashboard

The **dashboard** is a system overview, presented to you when logged into the staff control panel, as shown below.



1. Staff status
2. Department and ticket tree
3. Quick-insert menu
4. Navigation menu
5. Calendar overview

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6. Today overview
7. Instant-article search box

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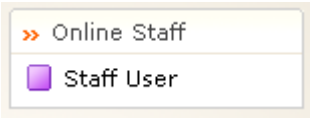
Staff status



The **online staff** box lists all staff users who are currently logged into the staff or admin control panel.

- A **purple icon** denotes the staff user logged into LiveResponse Client Application.
- A **yellow icon** denotes the staff user logged into the staff control panel.
- A **pink icon** denotes the staff user is logged into the administrator control panel.
- A **PDA icon** denotes the staff user is logged into the staff control panel via the PDA interface.

Clicking a staff user's name from within this box will take you immediately to a new **private message** screen, allowing you to send a private message to that staff member.

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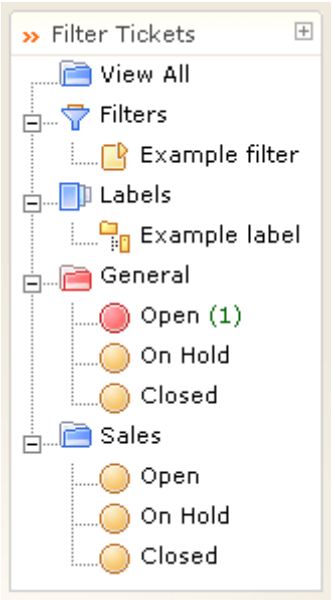
Department and ticket tree



The department tree lists the following:

- A view all link.
  - Clicking on this will show all tickets whose status is **open**.
- A list of filters.
  - Clicking on a filter name will display all tickets matching the criteria of the filter. For more information, see ticket filters.
- A list of labels.
  - Clicking on the name of a label will display all tickets that have the corresponding label attached. For more information, see ticket labels.
- A list of all support departments you (as a staff user) have access to.
  - Clicking on the name of a department will display all tickets whose status is set to **open**.
- The ticket statuses within each department.
  - Clicking on the name of a status will display all tickets set to the corresponding status. For more information on statuses, see ticket status.
- The ticket count within each department.
- A red icon if there is a newly updated ticket within the department or a yellow icon if there are no newly updated tickets within the department.
- Each tree on this menu is expandable and retractable. This means that clicking on the " + " or " – " icon at the top of each tree will respectively expand or retract that menu.
- Likewise, clicking on the " + " icon at the top-right of the tree content box will expand/retract **all** menus respectively.

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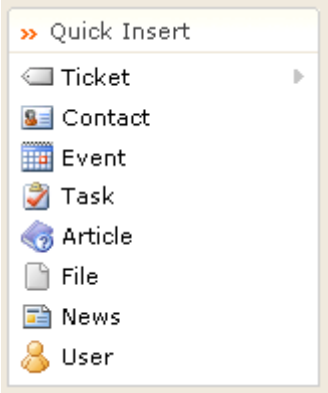
Quick-insert menu



The **quick-insert menu** provides one-click access to forms enabling you to insert or create new items within the system.

- **Ticket** – create a phone or an e-mail ticket (send an e-mail). For more information, see creating a ticket.
- **Contact** – create a new contact. For more information, see contacts.
- **Event** – insert a new event into the calendar. For more information, see teamwork.
- **Task** – create a new task. For more information, see teamwork.
- **Article** – create a new article and insert it into the knowledgebase. For more information, see knowledgebase.
- **File** – create a new file and insert it into the downloads database. For more information, see downloads.
- **News** – create a new news item. For more information, see news.
- **User** – create a new user (support desk users – not staff or administrator users). For more information, see creating a new user.

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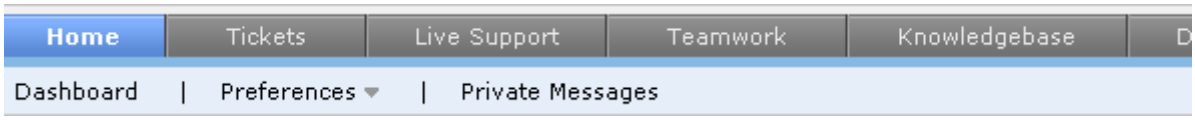
Navigation menu bar



The **navigation menu** allows for navigation around all of the core sections of SupportSuite. Depending on your configuration in the administrator control panel (see general settings), opening a menu item will involve clicking or hovering over an item.

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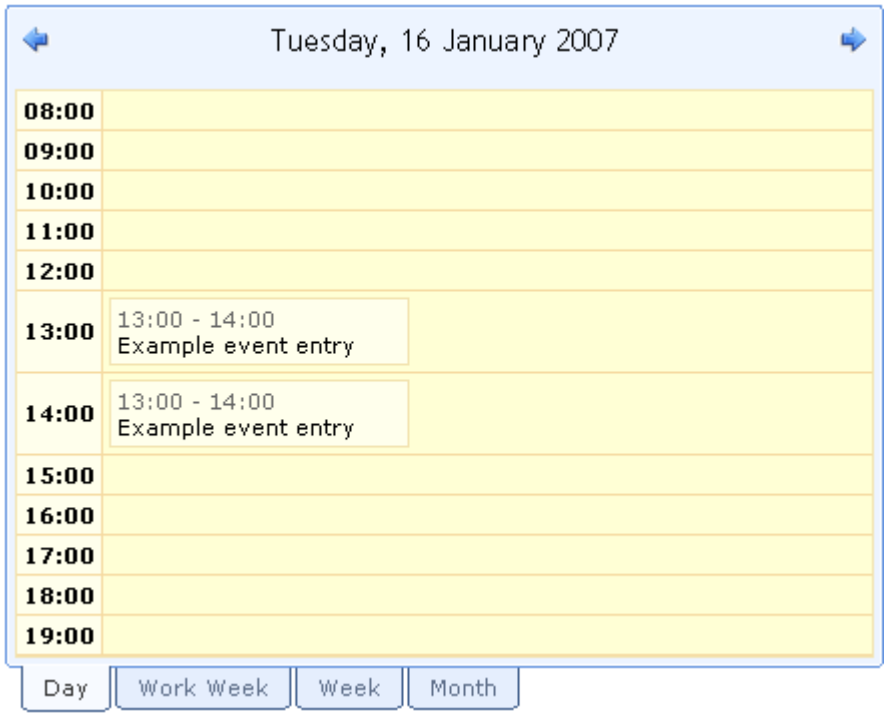
Calendar overview

The **calendar overview** shows today's public and private events for the **working hours** set in your staff user preferences (see the work schedule).

Clicking on an event will take you to more detailed information for that event entry, as shown below.



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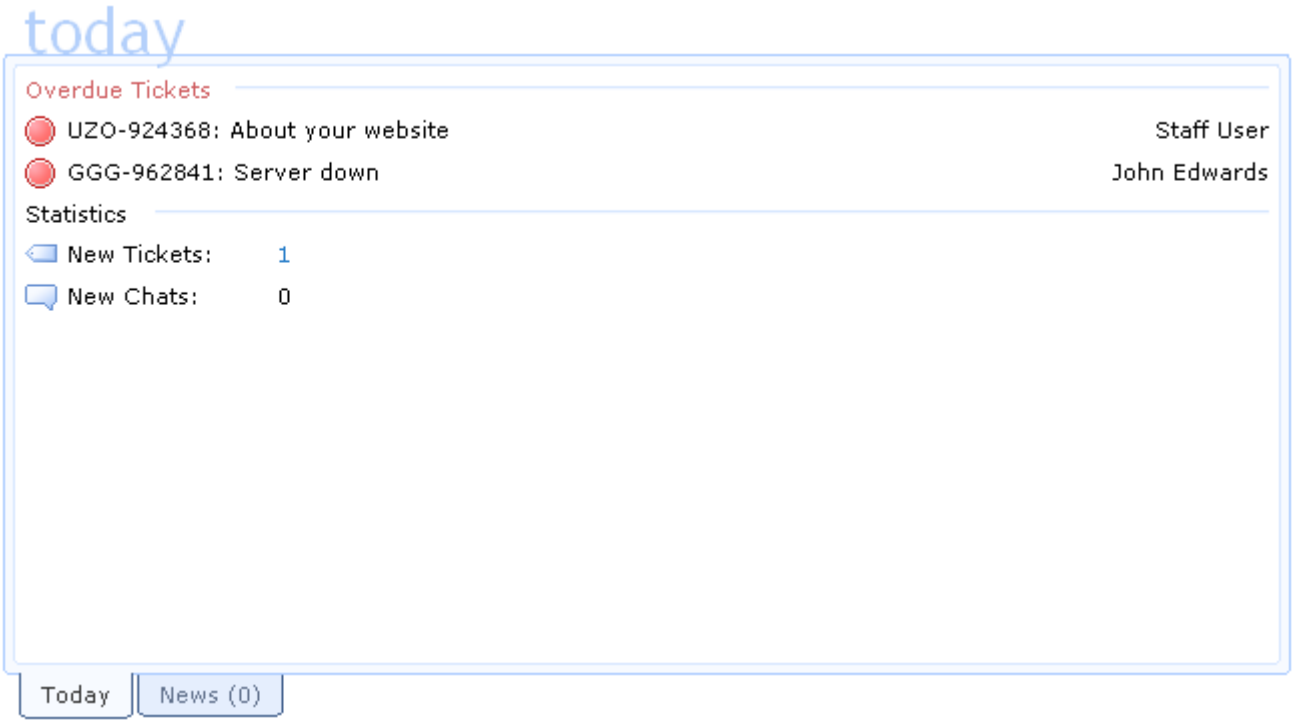
Today overview

The today overview gives a preview of the following information:

- Number of updated or new tickets ("new tickets") since your last visit.
- Number of new chats since your last visit.
- Number of tickets "due today".
- Number of tickets "overdue".



Clicking on the **News** tab will show news items that have been posted for staff user access only, as shown below. For information on managing and creating news items see news.

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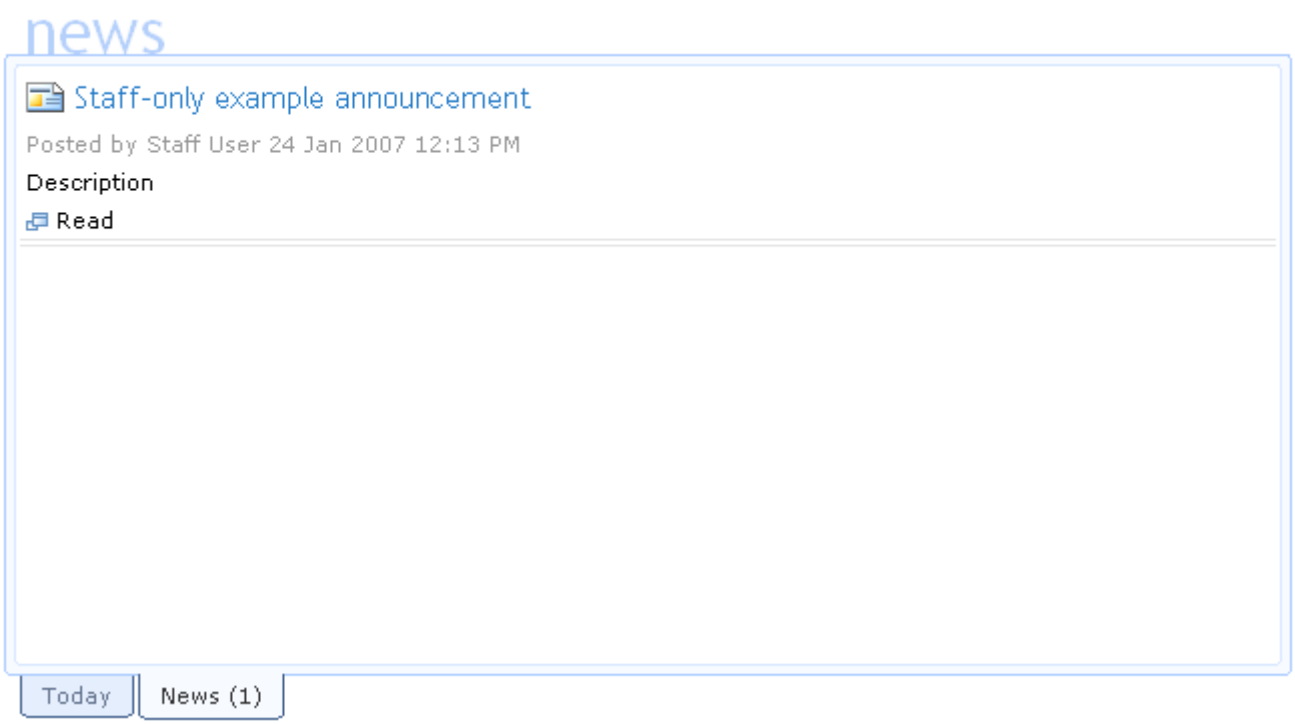

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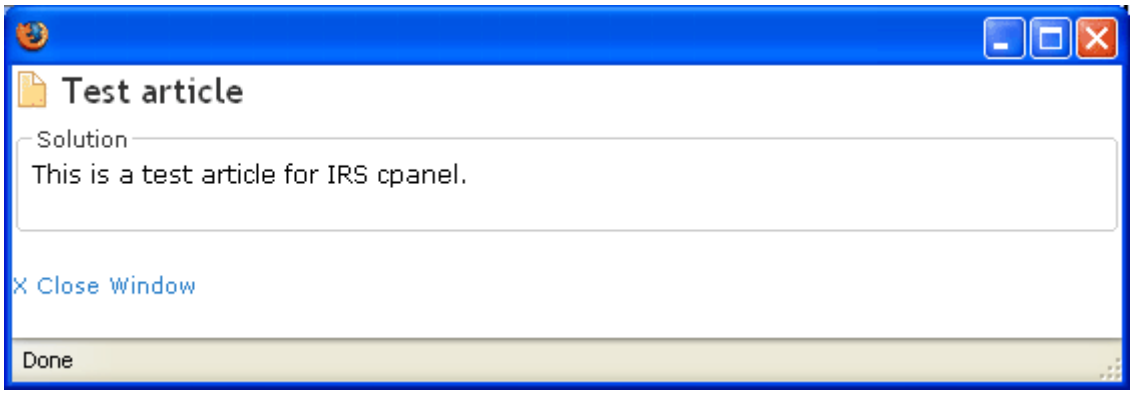
Instant article search box

Typing a keyword (or a series of keywords) into the search box on the top right of the interface will search all **knowledgebase** articles for related articles.

All the staff user has to do is type and wait for the search to be performed. Clicking on a search result will open the article contents as shown below.



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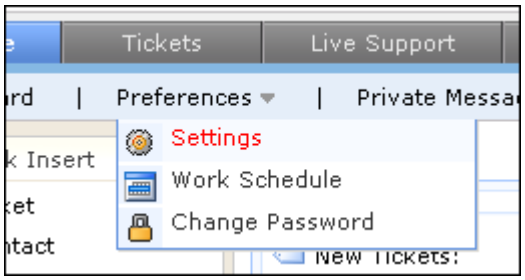
Staff user preferences

To access the preferences overview:

1. Open **Home** on the navigation menu bar, as shown below.



2. Open the **Preferences** sub-menu.
3. Click **Settings**.

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Staff Details
Required Fields
Team
Administrator
Full Name
Enter your Full Name. This name will be publicly visible to your users and also used as the From Name in all Outgoing Mails.
Staff User
Email
Please enter your personal email address here. All Alerts assigned to your username will be sent to this address. Please make sure that this address has not been created as an Email Queue. If there is an already existing Email Queue under the same address, it might create bounce back loops.
staff@user.com
Time Zone
Select your Time Zone. If set, this time zone will override the default setting.
-- Default Time Zone Setting --
Enable Daylight Savings
If Enabled, The Time Zone offset will be automatically corrected when Daylight Savings takes effect.
Yes
No
General Settings
Enable Private Message Email Alerts
If enabled, you will receive an alert via Email whenever a Private Message is sent to you.
Yes
No
Enable Private Message Javascript Alerts
If enabled, you will see a Javascript prompt confirming the receipt of a newly received Private Message.
Yes
No
Optional Fields
Cell Number
If you wish to receive SMS Alerts, enter your Mobile Number. Do not prefix or add any symbols such as + or -, etc.
Example: 13038761234
Signature
Enter the signature you wish to be appended to all outgoing mails.
Update Details

Required Fields

- **Team** – if you have been added to a staff team (configurable using the administrator control panel), the team name will be displayed here.
- **Full Name** – your full name. This name will appear on your ticket replies, for example.
- **E-mail** – your personal e-mail address.
- **Timezone** – a configurable timezone offset.
- **Enable Daylight Savings** – enabling this option will cause SupportSuite to automatically correct its timezone offset when daylight savings time is applicable.

General Settings

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- **Enable Private Message E-mail Alerts** – enabling this option will cause SupportSuite to send an e-mail to your personal e-mail address (configured above) upon receipt of a private message sent via the staff control panel.

- **Enable Private Message JavaScript Alerts** – enabling this option will cause a JavaScript popup window to appear whenever you receive a new private message, as shown below.

Optional Fields

- **Cell Number** – your cell phone (mobile phone) number. This is especially required if you plan to use the Kayako SMS Gateway (see Kayako SMS gateway).

- **Signature** – this signature field can be appended to all of your ticket replies.

Click the **Update Details** button to confirm your preference changes.

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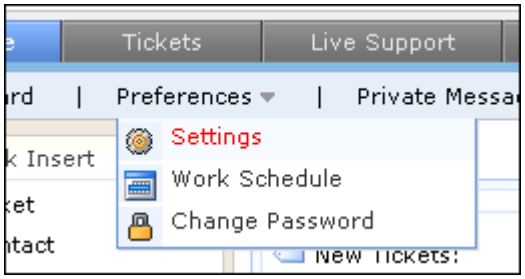
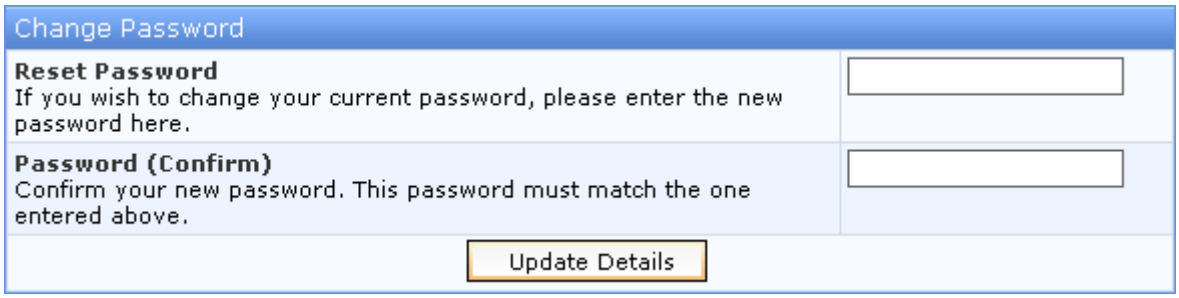
Changing your password

To change your password:

1. Open **Home** on the navigation menu bar, as shown below.



2. Open the **Preferences** sub-menu.
3. Click **Change Password**.


Change Password
Reset Password
If you wish to change your current password, please enter the new password here.
Password (Confirm)
Confirm your new password. This password must match the one entered above.
Update Details

- **Reset Password** – enter your new password here.
- **Password (Confirm)** – renter your new password to confirm your typing.

Click the **Update Details** button to make the password change.

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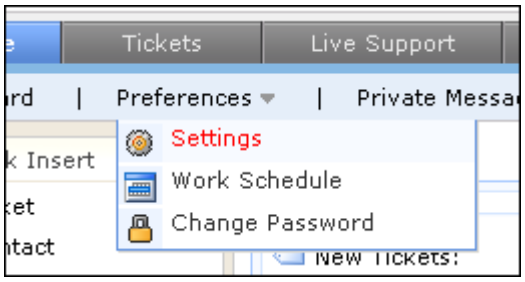
Your work schedule

The work schedule is configurable by yourself and can be found under the **Preferences** menu.

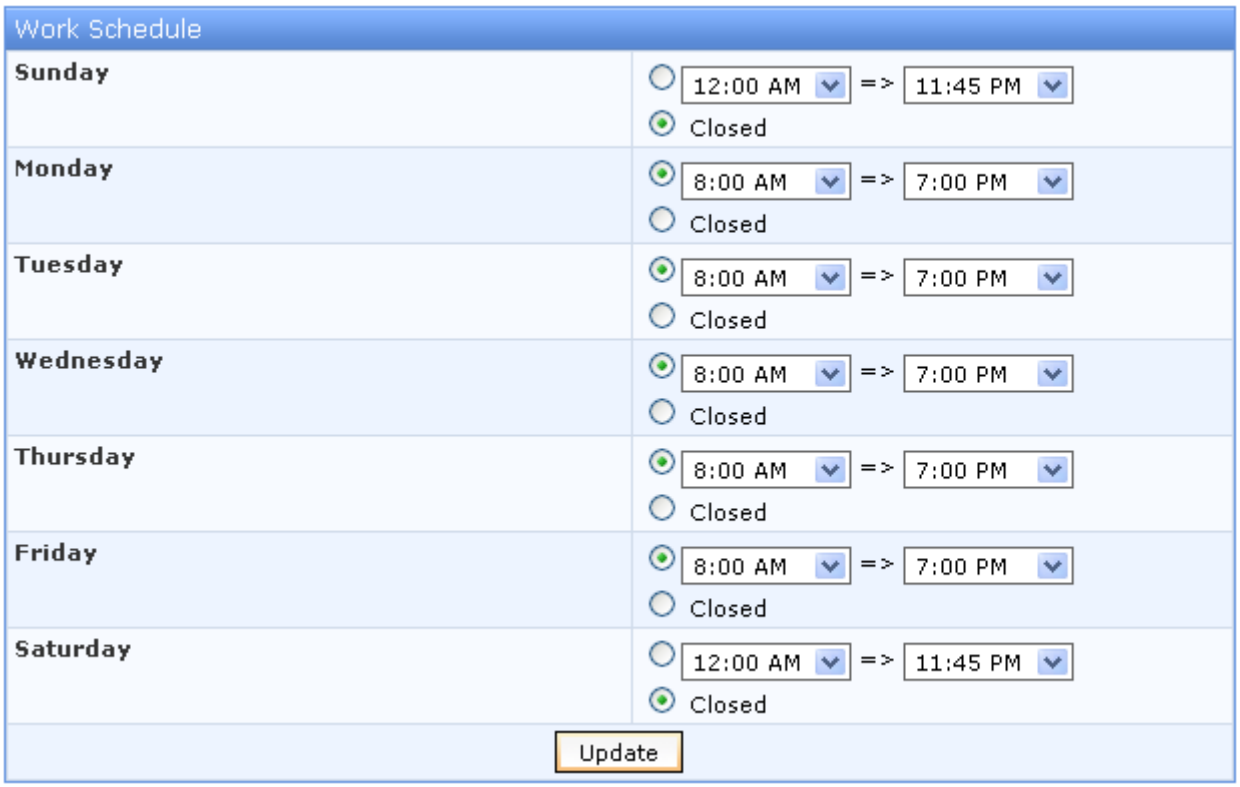
The work schedule entered here determines the **hours** that are displayed for your daily calendar overview on the dashboard, as shown in the dashboard section – where only your working hours set here are displayed.

To access the work schedule area:

1. Open **Home** on the navigation menu bar, as shown below.



2. Open the **Preferences** sub-menu.
3. Click **Work Schedule**.



Modify the hours for each day as appropriate, or select the **Closed** radio button if no hours are worked on this day.

Click the **Update** button to save your edited work schedule.

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Tickets

The ticketing features of SupportSuite make up one of the major components of the system – ticketed help support.

The **client user** can submit a ticket via the **client support interface** (through form) or (if an e-mail pipe has been configured in the **administrator control panel**), the user can submit a ticket through e-mail.

When a new e-mail is sent with a new subject, a new ticket is created. All e-mail replies to this e-mail subject (which contains, by this time, a **ticket ID**) will be appended to the same ticket.

The client can log in to the **client support interface** and review all correspondence to and from their e-mail address, and staff users can log in to the **staff control panel** to review tickets (such as move their department, respond to tickets, change a ticket's status and much more).

A ticket comes with the following properties:

- A department – where the ticket is located. A typical set of departments would be "Sales", "Billing" and "Support".
- A status – open, closed and on-hold are the default statuses.
- A priority – low, medium, high, critical and emergency are the default priorities.
- A label – labels or "tags" can be attached to tickets (staff use only).
- A flag – a colored flag used to flag tickets (staff use only).
- Notes – notes for view only by other staff users.
- Billing information – staff users can keep track of their time spent working on a ticket.

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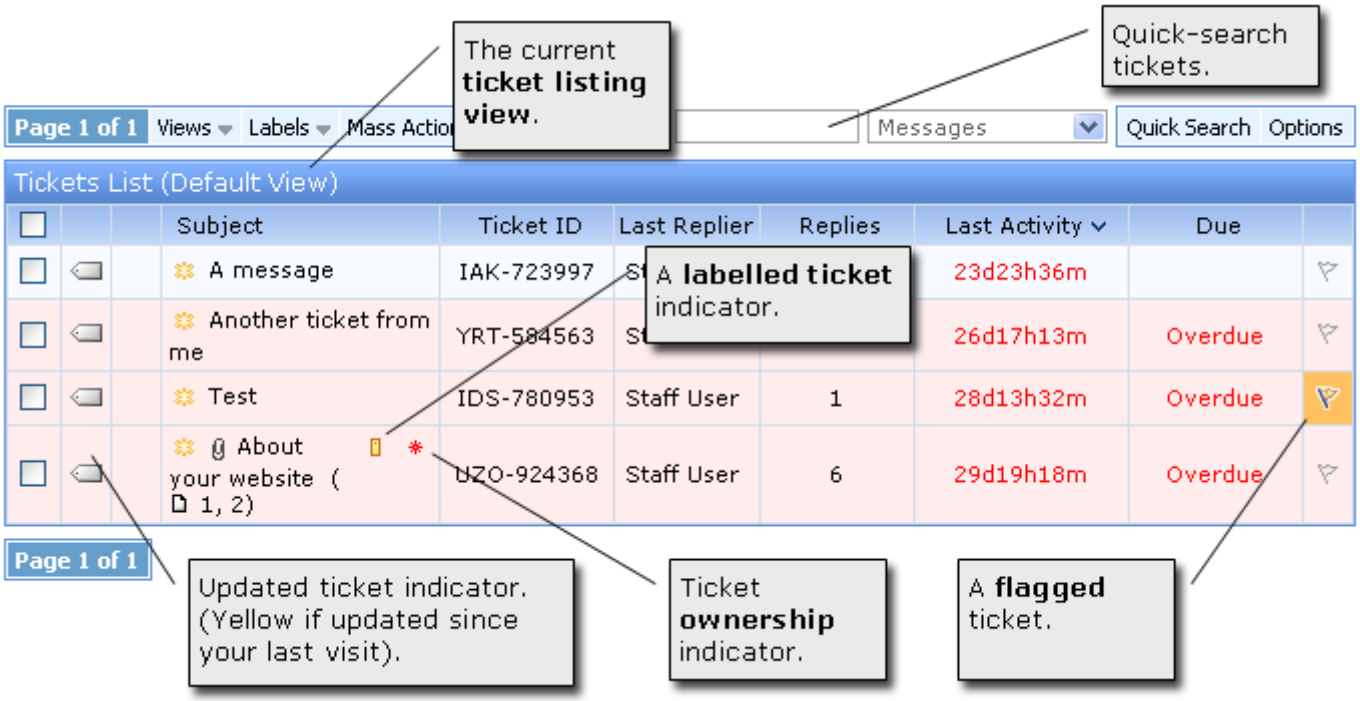
Listing tickets

A **ticket list** is a listing of tickets, an example of which is shown below.



- **The current view** – the name of the ticket view currently being used. For more information on customized ticket views, see customized ticket listing view.
- **Ticket ownership indicator** – the red star indicates that the ticket is assigned to you (the staff user). For more information on ticket assignments, see ticket assignment / ticket ownership.
- **Ticket label indicator** – the ticket has one or more **label(s)** attached to the ticket. For more information on ticket labels, see ticket labels.
- **Updated ticket indicator** – this indicator will display as yellow if a new reply has been made to the ticket since your last visit. Hovering the mouse over this icon will give a brief ticket overview, as shown below.

The **Last Activity** column displays how long a ticket has been last updated (either by a staff user or an end-user). The text color changes according to how long the ticket has been idle for:

- Less than a minute: Green
- Less than an hour: Blue
- Less than one day: Orange
- Longer than one day: Red

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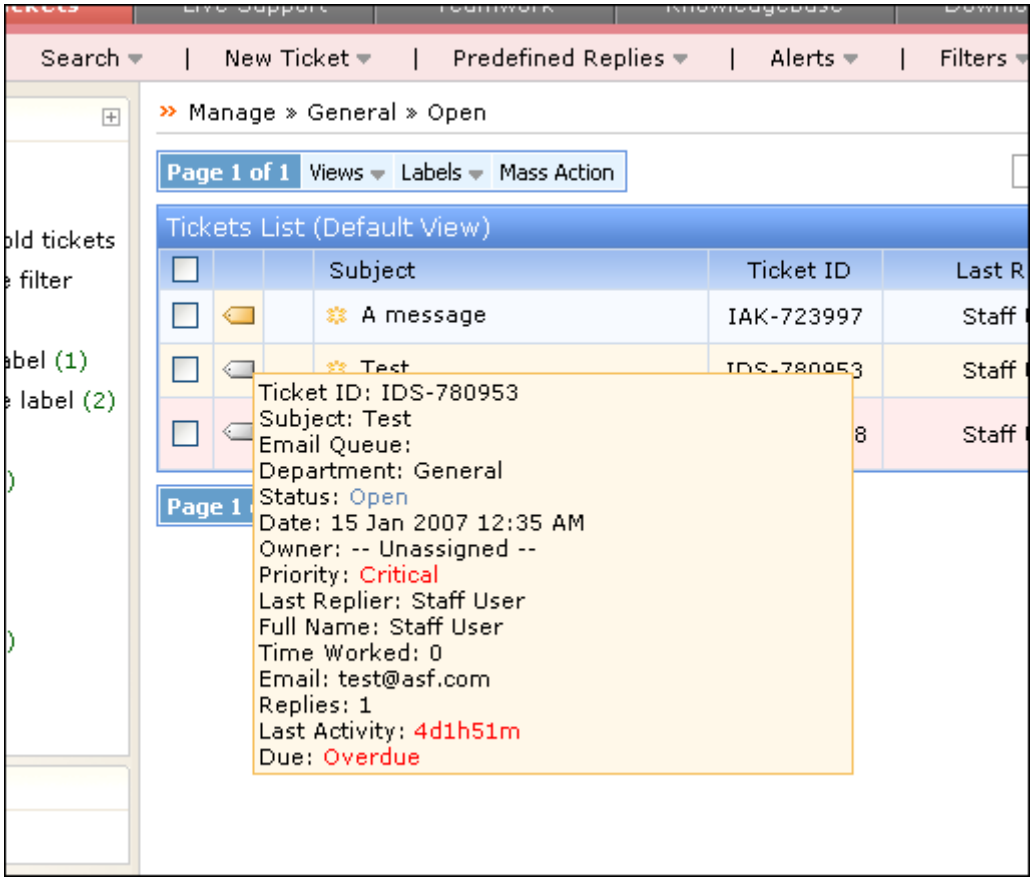
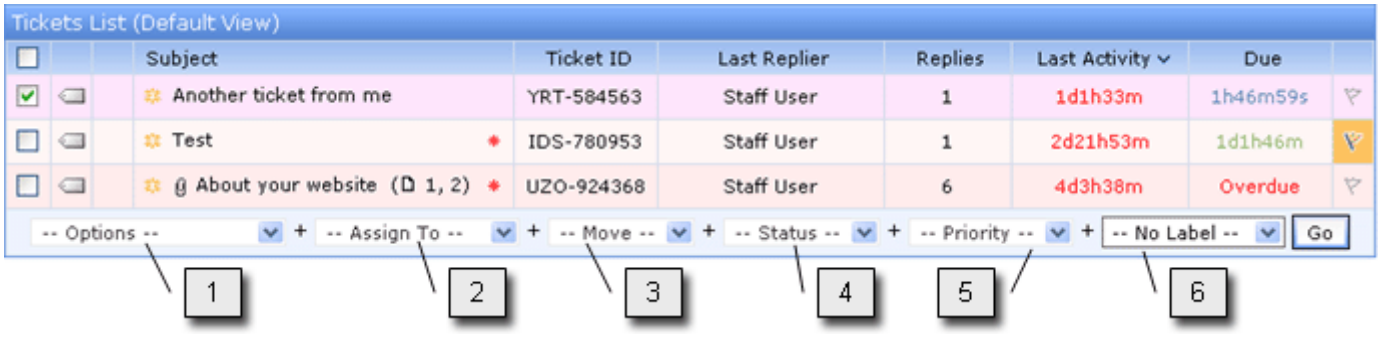


The ticket lists can be customized according to criteria configured by each staff user. For example, a ticket list can be generated that lists all open tickets. Customizing multiple ticket lists allows you to quickly sort through tickets.

Mass-managing tickets within the ticket list

On any ticket list, multiple tickets can be mass-managed using an additional toolbar that will appear in the view once more than one ticket has been "selected".

Selecting a ticket involves c**hecking the tick-box** of the appropriate ticket or by clicking on the **Mass Action** link, as shown below.



1. Options
2. Assign to

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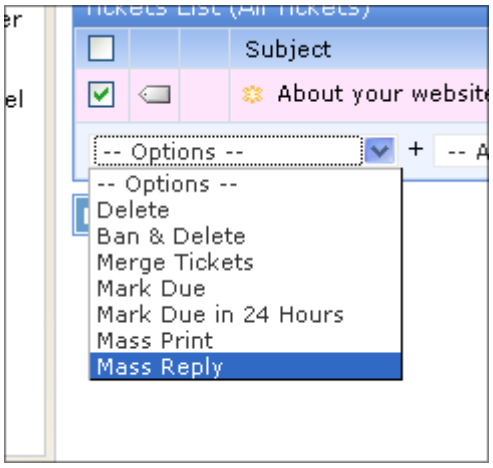
3. Move
4. Status
5. Priority
6. Labels and flags

Options

The options menu opens a list of **ticket management tasks** that can be performed on the selected tickets, as shown below.



- **Delete** – delete the ticket(s) from the database. Ticket deletion cannot be undone.
- **Ban & Delete** – add the sender's address to the ban list and delete the ticket. Banning a sender's address will mean that any tickets sent from this address will not be processed. Ticket deletion cannot be undone. However, bans can be lifted via the administrator control panel (see e-mail bans in the administrator control panel).
- **Merge Tickets** – combine the contents of multiple tickets (ticket postings and responses will be merged together chronologically).
- **Mark Due** – the tickets will be marked as due for action.
- **Mark Due in 24 Hours** – the tickets will be marked as due for action in 24 hours.
- **Mass Print** – all of the selected ticket(s) and their contents will be combined into a printer-friendly view.
- **Mass Reply** – send one reply to multiple tickets.

Assign to

Opening this menu will list **staff members** to who the ticket(s) can be assigned, as shown below. For more information on ticket assignments, see ticket assignments.

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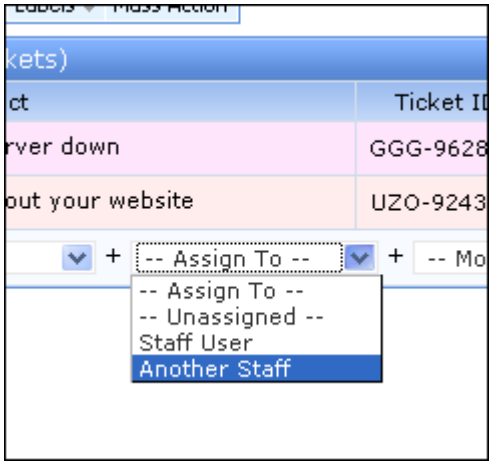
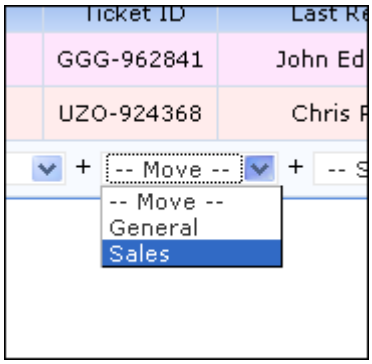


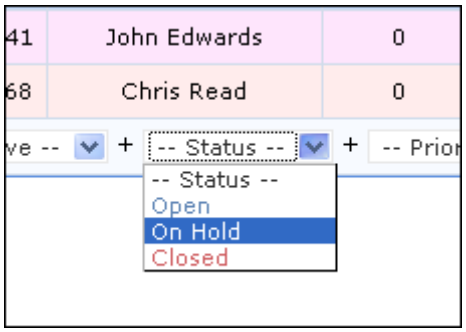
Move

Clicking on this menu will open a list of **departments** to which the ticket can be moved (transferred). Departments are managed and configured in the administrator control panel (see departments in the administrator control panel).



Status

Clicking on this menu will open a list of **statuses** that the selected ticket(s) can be changed to, as shown below. For more information on ticket statuses and how they are used within the staff control panel, see ticket status.



Ticket statuses are configured in the administrator control panel (see ticket statuses in the administrator control panel).

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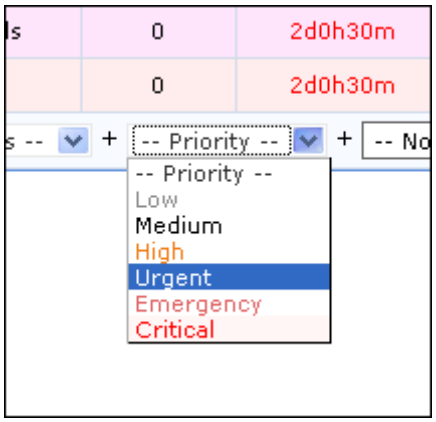
Priority

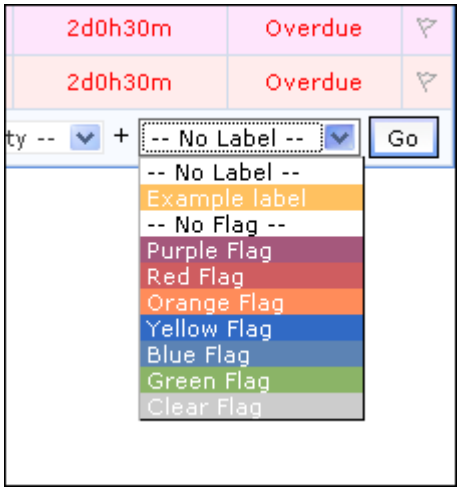
Clicking on this menu will open a list of **priorities** that the selected ticket(s) can be set to, as shown below. For more information on how ticket priorities are used in the staff control panel, see ticket priority.



Priorities are defined in the administrator control panel (see ticket priorities in the administrator control panel).

Labels and Flags

Clicking on this menu will open a list of **labels and flags** that can be attached to the selected tickets, as shown below. For more information on labels and flags are used in the staff control panel, see ticket labels and ticket flags.



Ticket listing area options and preferences

The ticket list options can be accessed by clicking on the **Options** button, as shown below.

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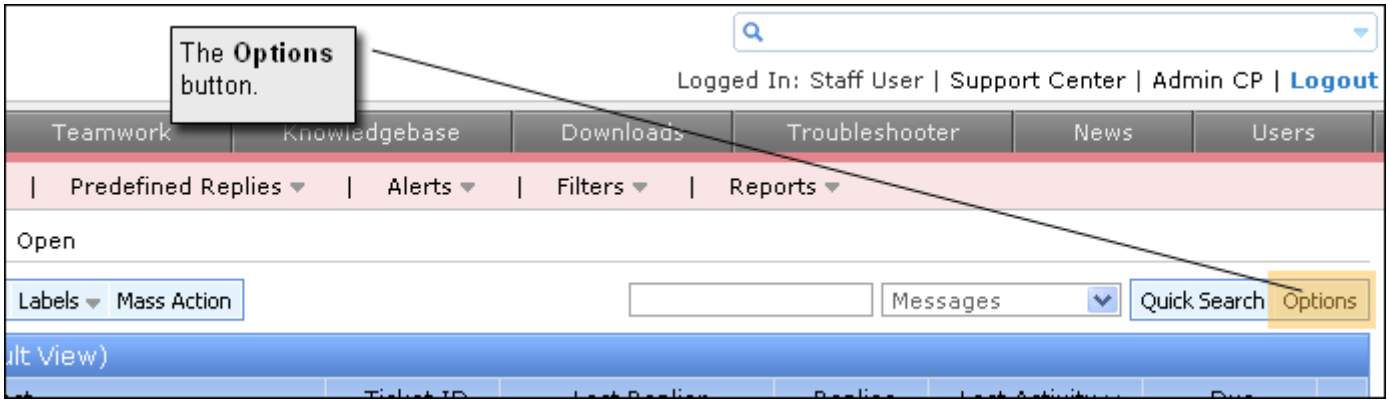
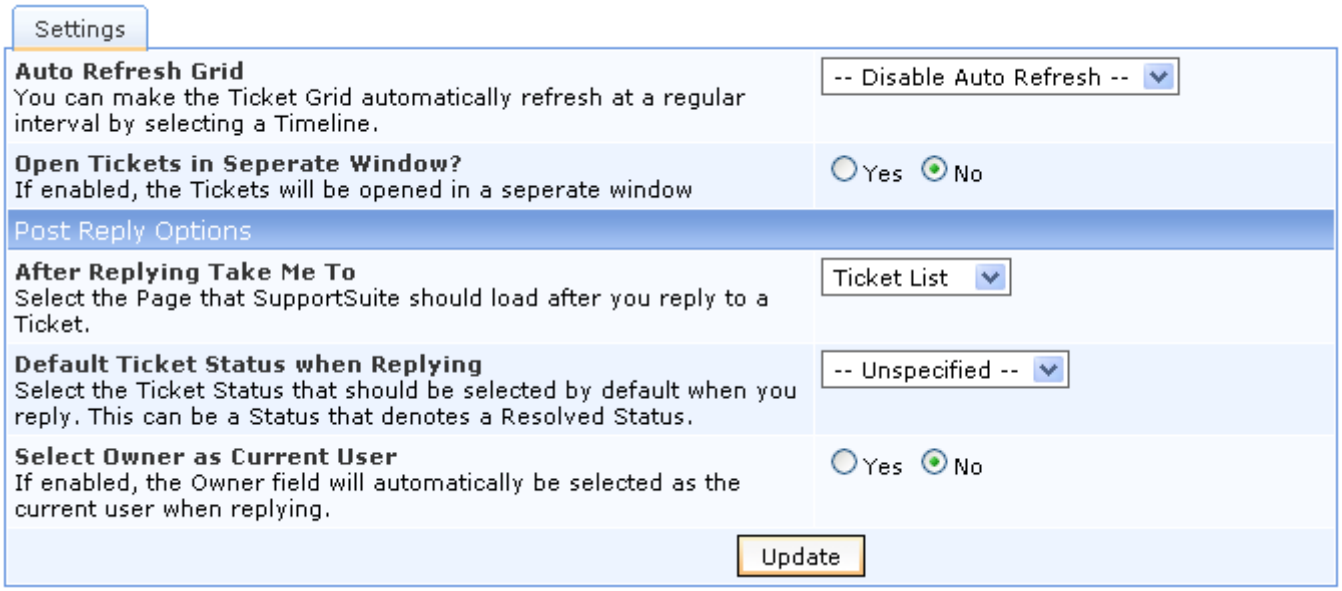


Clicking on this button will expand the list options interface, as shown below.


Settings
Auto Refresh Grid
You can make the Ticket Grid automatically refresh at a regular interval by selecting a Timeline.
-- Disable Auto Refresh --
Open Tickets in Seperate Window?
If enabled, the Tickets will be opened in a seperate window
Yes
No
Post Reply Options
After Replying Take Me To
Select the Page that SupportSuite should load after you reply to a Ticket.
Ticket List
Default Ticket Status when Replying
Select the Ticket Status that should be selected by default when you reply. This can be a Status that denotes a Resolved Status.
-- Unspecified --
Select Owner as Current User
If enabled, the Owner field will automatically be selected as the current user when replying.
Yes
No
Update

Ticket listing options affect all ticket listings viewed under your staff user account.

- **Auto Refresh Grid** – enabling this option will cause the ticket list to refresh itself periodically at an interval set here.
- **Open Tickets in Separate Window** – if enabled, clicking on a ticket subject from within a ticket list will open the ticket in new browser window, as opposed to opening within the same browser window.
- **After Replying Take Me To** – this option defines where you will be taken after replying to a ticket. It can be set to one of:
    - **Ticket** (the ticket replied to)
    - **Ticket List**
    - **Next Ticket**
- **Default Ticket Status when Replying** – this option allows for the selection of a default ticket status that a ticket will be set to following your reply. For example, if replying to a closed ticket while this option has been set to open, the ticket's status will be set to open following your reply.

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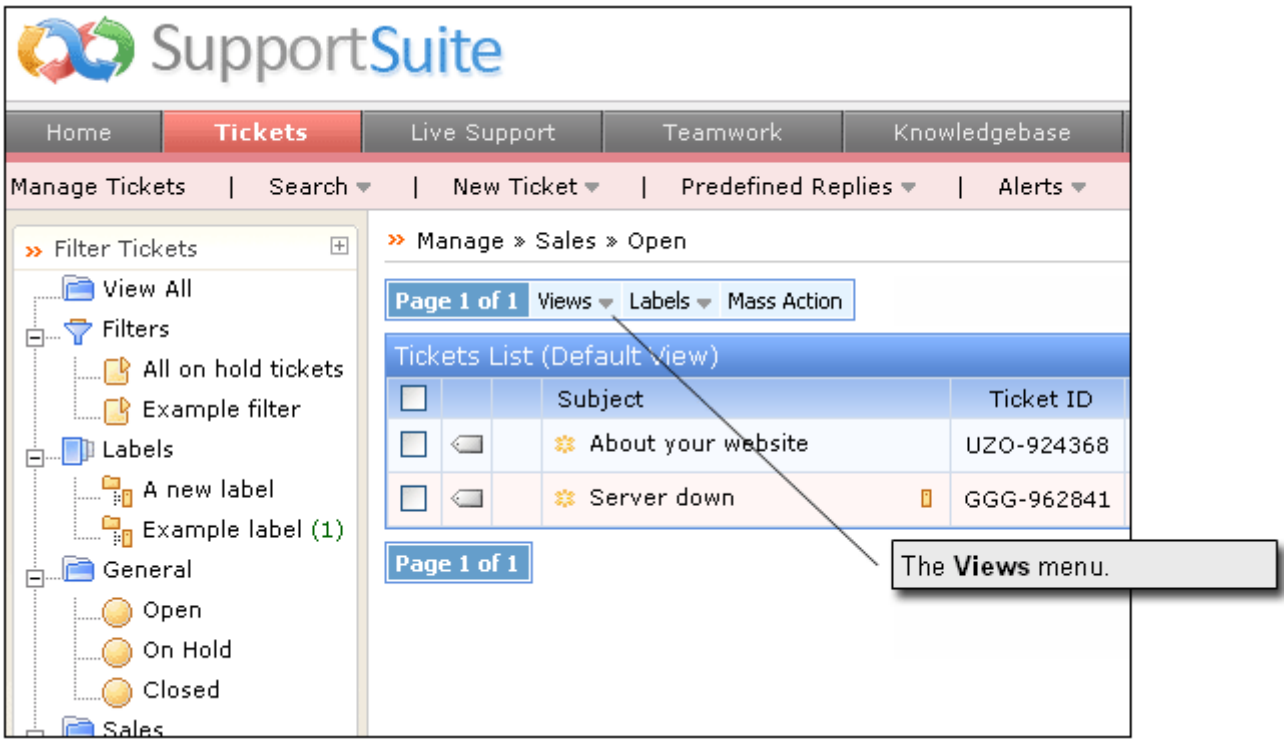
- **Select Owner as Current User** – if enabled, a ticket will be assigned to the staff user who first replies to a ticket.

Click on the **Update** button for the changes to take effect.

Customizing your ticket lists

From within a ticket list, the "view" of the list of tickets can be customized. Listing **templates** can be created to display a list of tickets in a particular way. For example, the information for the tickets shown in a list can be customized.

When viewing a ticket list, the **ticket listing view** can be changed by clicking the **Views** menu, as shown below.



Clicking this menu will open the **ticket listing views menu**, as shown below.

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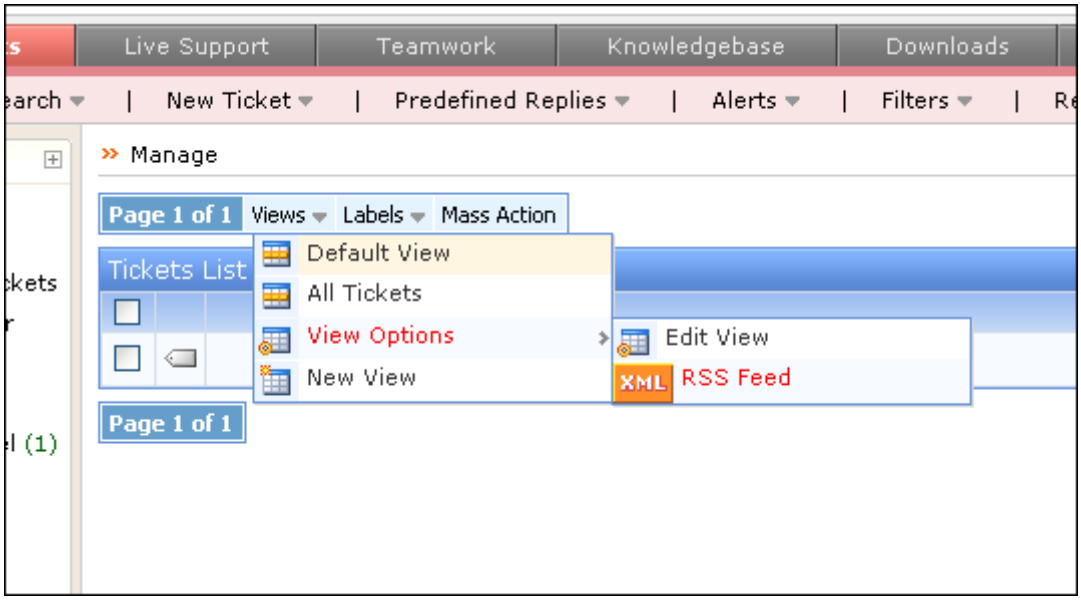

- **Default View** – the standard ticket list view. Opening this view will restore all the default ticket listing columns. Any saved custom view will not be erased, and will still be selectable.
- **All Tickets** – a view of all tickets that are set to open.
- **View Options** – options that allow editing and deletion of the current ticket listing view, applicable if you have a customized ticket list view open.
- **Edit View** – edit the current open ticket listing view. For information on editing ticket listing views, see creating a new ticket listing view.
- **RSS Feed** – a RSS feed of the tickets listed within the current open ticket listing view. See what is an RSS feed, in the frequently asked questions.
- **New View** – create a new, customized ticket listing view. See creating a new view for more information.

When opening a view, the name of the view will be shown on the ticket listing as indicated below.

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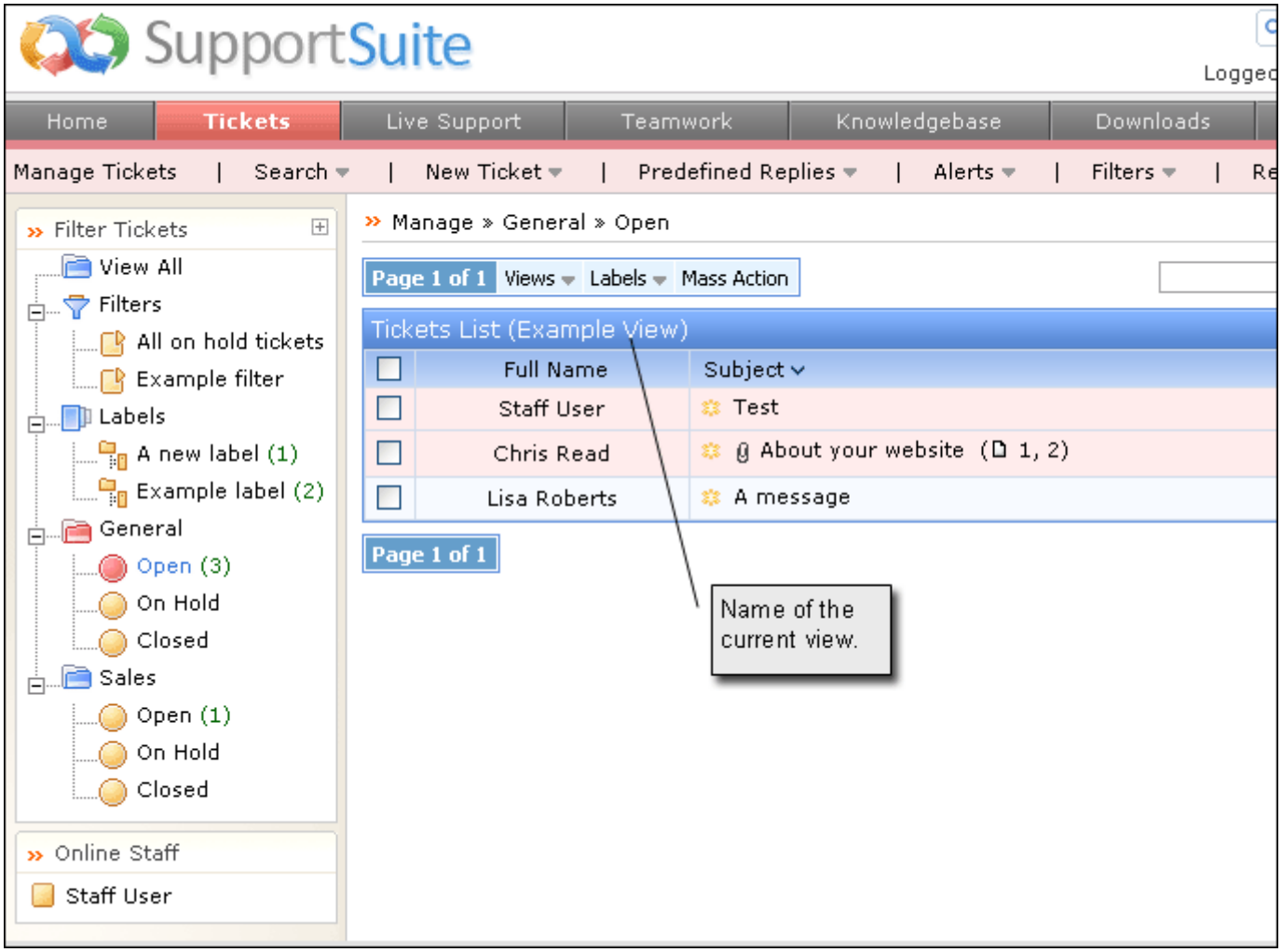

Creating a new ticket listing view

To create a new ticket listing view:

1. From within a ticket list, click on the views menu, as shown below.

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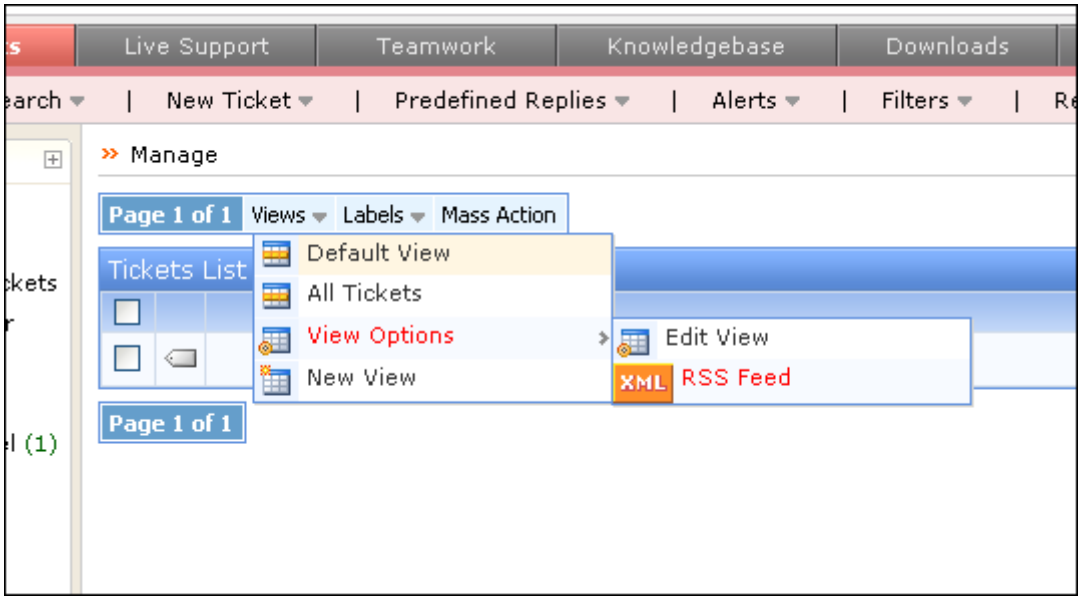
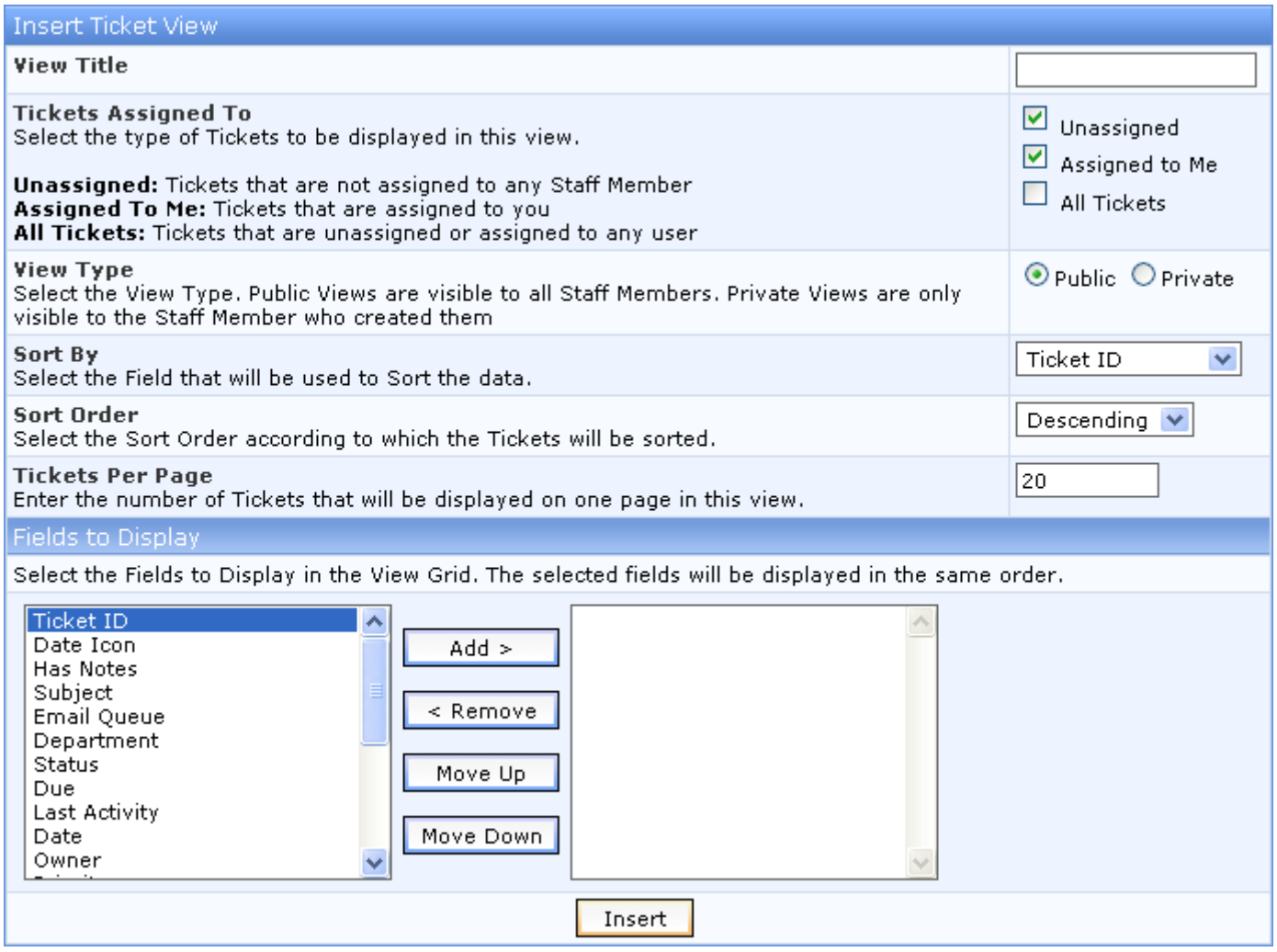


2. Click on the **New View** option.

3. An interface similar to the following will be opened.


Insert Ticket View
View Title
Tickets Assigned To
Select the type of Tickets to be displayed in this view.
Unassigned: Tickets that are not assigned to any Staff Member
Assigned To Me: Tickets that are assigned to you
All Tickets: Tickets that are unassigned or assigned to any user
Unassigned
Assigned to Me
All Tickets
View Type
Select the View Type. Public Views are visible to all Staff Members. Private Views are only visible to the Staff Member who created them
Public
Private
Sort By
Select the Field that will be used to Sort the data.
Ticket ID
Sort Order
Select the Sort Order according to which the Tickets will be sorted.
Descending
Tickets Per Page
Enter the number of Tickets that will be displayed on one page in this view.
20
Fields to Display
Select the Fields to Display in the View Grid. The selected fields will be displayed in the same order.
Ticket ID
Date Icon
Has Notes
Subject
Email Queue
Department
Status
Due
Last Activity
Date
Owner
Add >
< Remove
Move Up
Move Down
Insert

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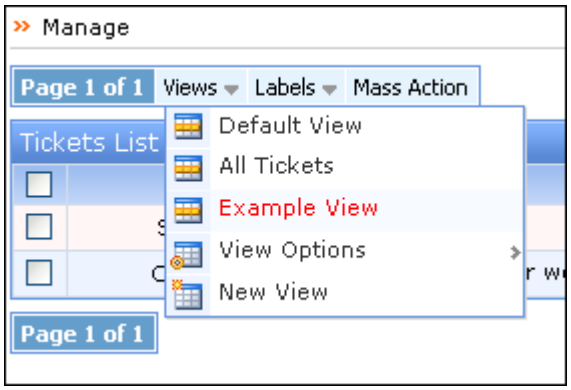
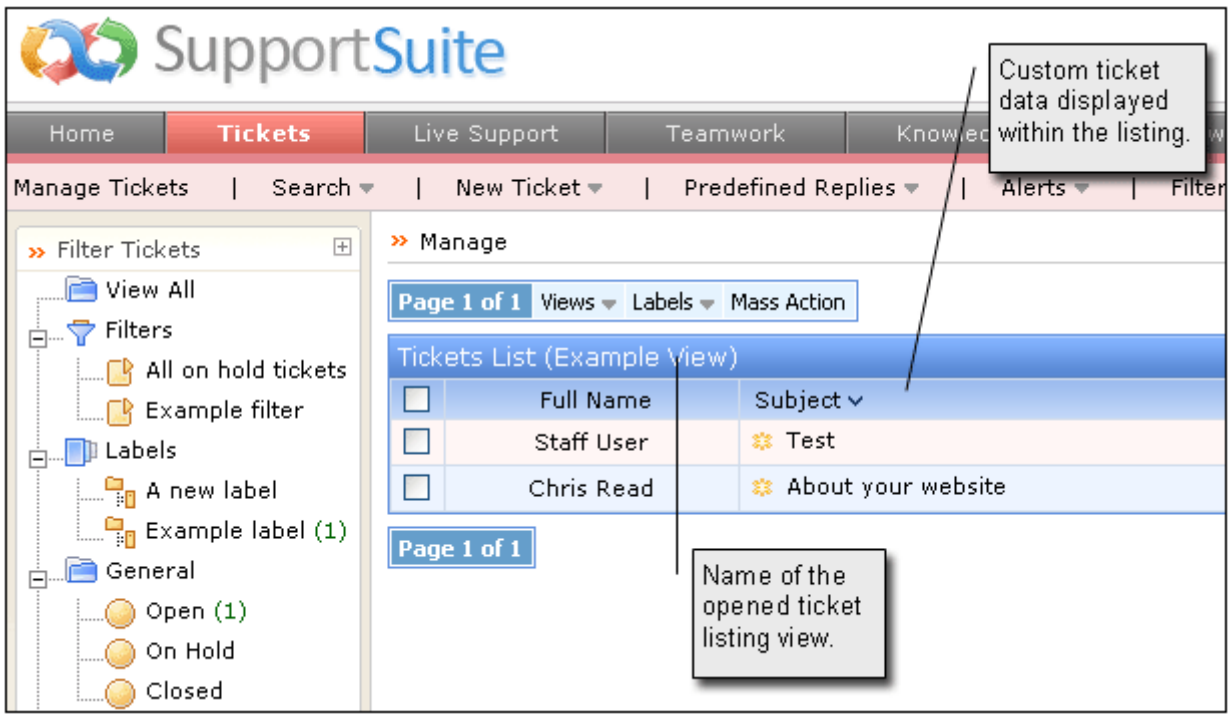
- **View Title** – the name of the ticket listing view.
- **Tickets Assigned To** – these ticket assignments will be shown within the ticket listing view.
- **View Type** – if set to public, the ticket listing view will be available to all staff users. If set to private, the view will be available only to you.
- **Sort By** – by what data the tickets will be sorted (such as ticket ID, last response time, subject etc).
- **Sort Order** – whether the tickets will be sorted from top-to-bottom (ascending) or bottom-to-top (descending).
- **Tickets Per Page** – the numbers of tickets to list per page.
- **Fields to Display** – the fields that will be displayed within the ticket listing view.

An example of a customized ticket listing view, set to display all tickets and show only the ticket subject and ticket creator fields is shown below.

The new customized view can be opened from within the **Views** menu:





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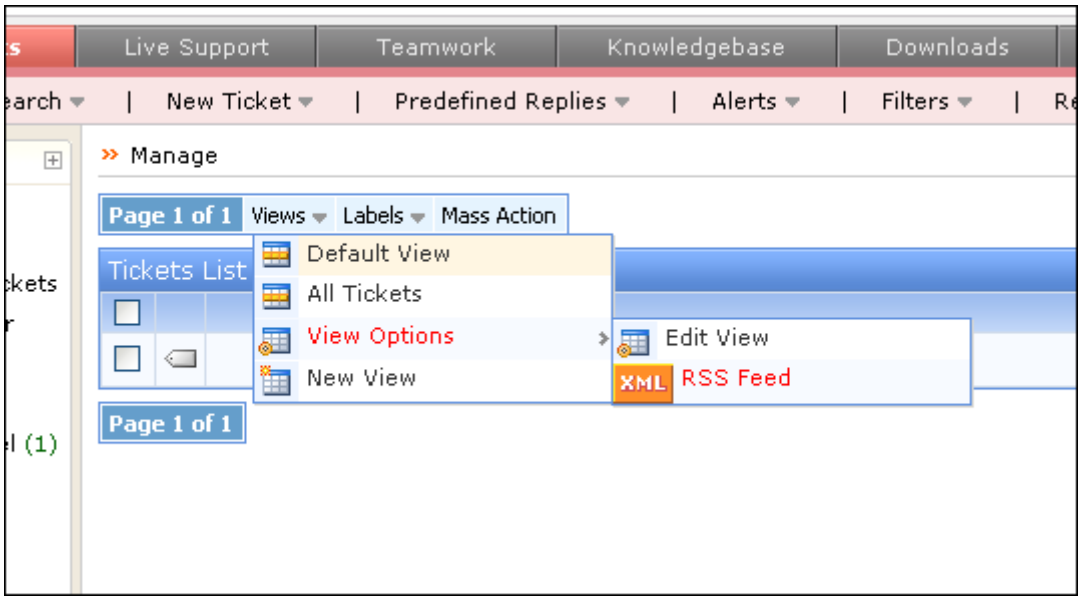
Deleting a ticket listing view

To delete a ticket listing view:

1. From within a ticket list click on the **Views** menu, as shown below.



2. Click on the **View** you wish to delete.
3. Open the **Views** menu again.
4. Hover over **View Options**.
5. Click **Delete View**.

Viewing tickets by department

Tickets of a certain status are directly accessible within the SupportSuite interface without you having to create a customized view.

Under the department and ticket tree (as shown below), click on the **status** under the **department** you wish to view.

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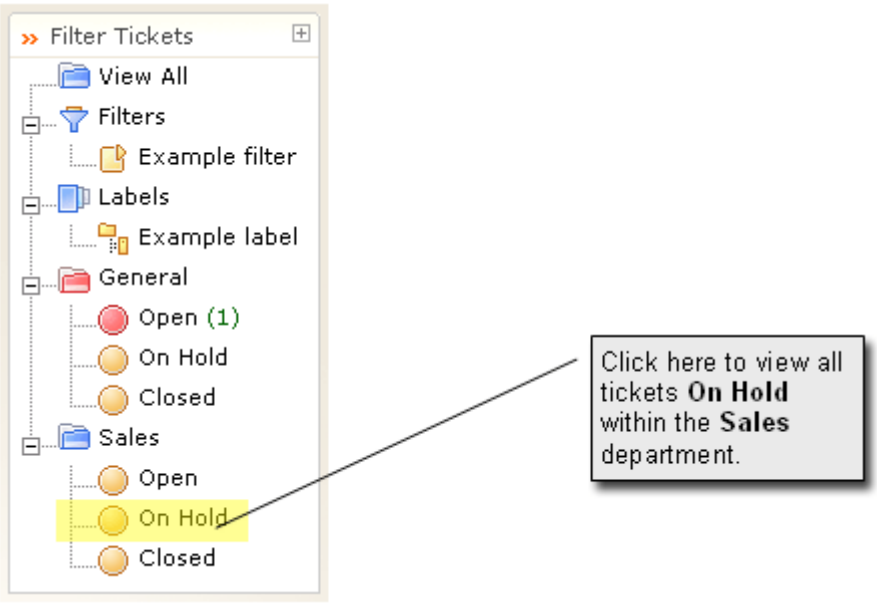
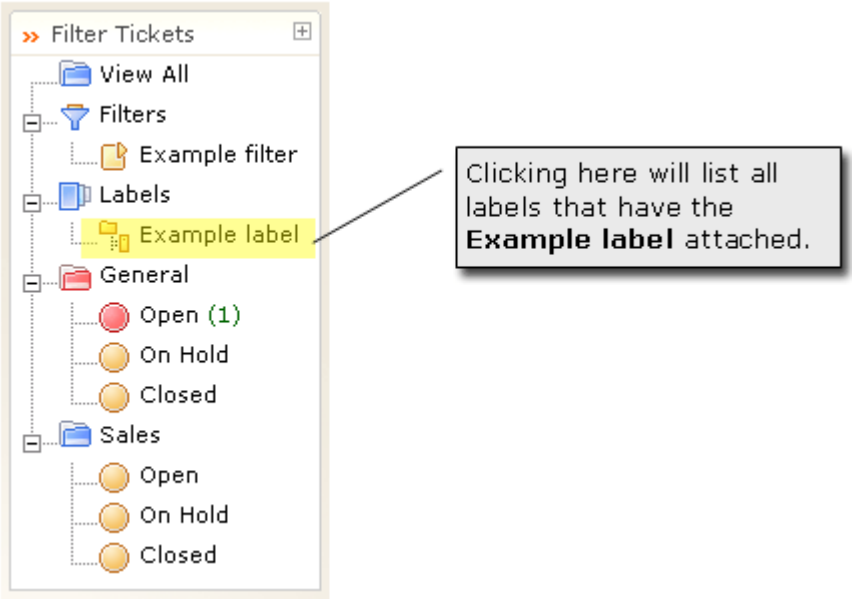


Departments are configured in the administrator control panel (see departments in the administrator control panel).

Viewing tickets by label

Under the department and ticket tree (as shown below), click on the **label name** you wish to view tickets by.



Ticket labels are created and managed in the staff control panel. For more information, see ticket labels.

Viewing tickets by filter

Ticket filters can be executed directly within the SupportSuite interface without you having to create a customized view. Executing a ticket filter will list all tickets that match a filter's criteria.

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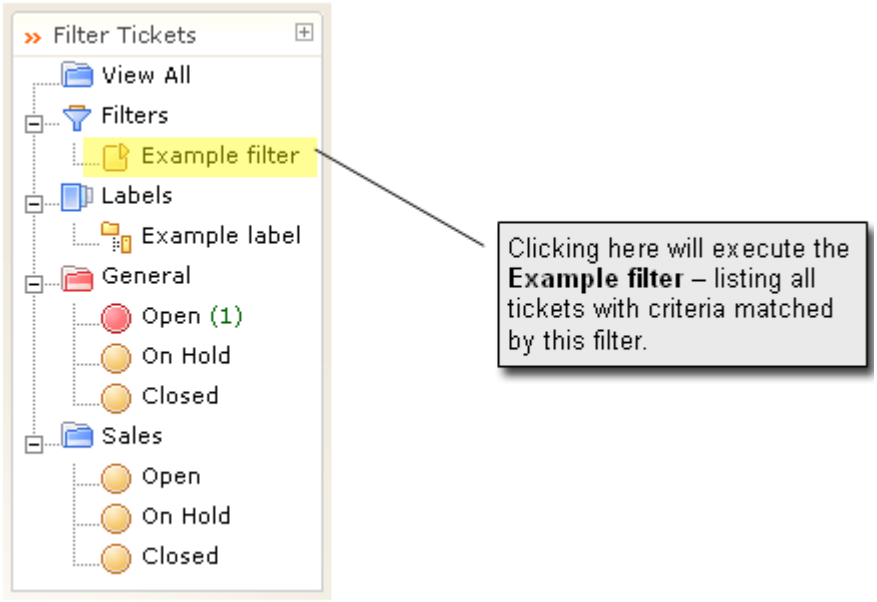
Under the department and ticket tree (as shown below), click on the **filter name** you wish to filter tickets by.



Ticket filters are created and managed in the staff control panel. For more information, see ticket filters.

RSS feeds of tickets

RSS feeds of tickets can be generated and customized using **ticket listing views**. For more information, see the RSS Feed option described in customized ticket listing views. Also see what is an RSS feed, in the frequently asked questions.

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Organizing and searching tickets

There are several features of SupportSuite that allow for easy organizing and management of tickets within the staff control panel.

Tickets primarily reside in a department. A ticket within a department can then have a status that is specific to the ticket's residence within a department. On top of this, a ticket can have a global label (that is not specific to it's department).

Ticket departments

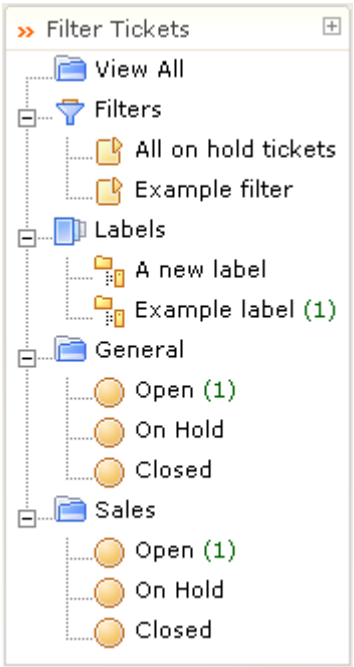
Tickets are stored in **departments**. A typical set of departments may be Sales, Support and Enquiries. Departments are managed and configured in the administrator control panel (see departments in the administrator control panel).

Ticket status

Every ticket has a **status**. The system default ticket statuses are **Open**, **Closed** and **On Hold**. As well as having a default set of statuses, it is also possible to create custom statuses (see statuses in the administrator control panel).

Viewing tickets by status

Tickets can be listed by status by clicking on a respective **ticket status** on the department and ticket tree (if the visibility of the status on the department and ticket tree has been set to visible within the administrator control panel, see departments in the administrator control panel), as shown below.



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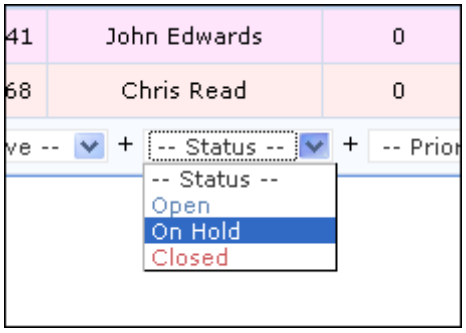
Tickets (either hidden from the department and ticket tree or not) can also be viewed by status using ticket filters.

Changing the status of a ticket

To change the status of multiple tickets from within a ticket listing:

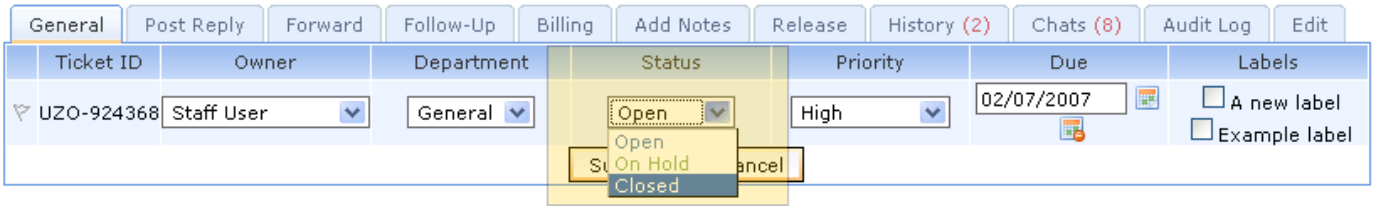
1. Select one or more tickets by checking the corresponding check-boxes.
2. On the **mass-management menu** (as shown below), click on the **Status** menu.



3. Select a **Status** for the ticket(s).
4. Click on the **Go** button to proceed with the changes.

To change the status of a ticket from within a ticket view:

1. Click on the ticket's **ticket information bar** to make the bar editable, as shown below.



2. Click on the **Status** menu.
3. Select a **Status**.
4. Click on the **Submit** button to proceed with the changes.

Ticket priority

Each ticket has a **priority**. The priority of a ticket is a way of ordering importance or urgency. By default, SupportSuite and eSupport adds the following priorities to the system:

- Critical
- Emergency
- Urgent
- High

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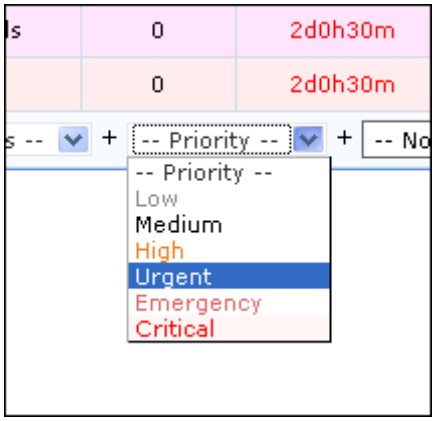
- Medium
- Low

Priorities are customized (such as adding or removing levels of priority that can be given to tickets) in the administrator control panel (see ticket priorities in the administrator control panel).

Changing the priority of a ticket

To change the priority of multiple tickets from within a ticket listing:

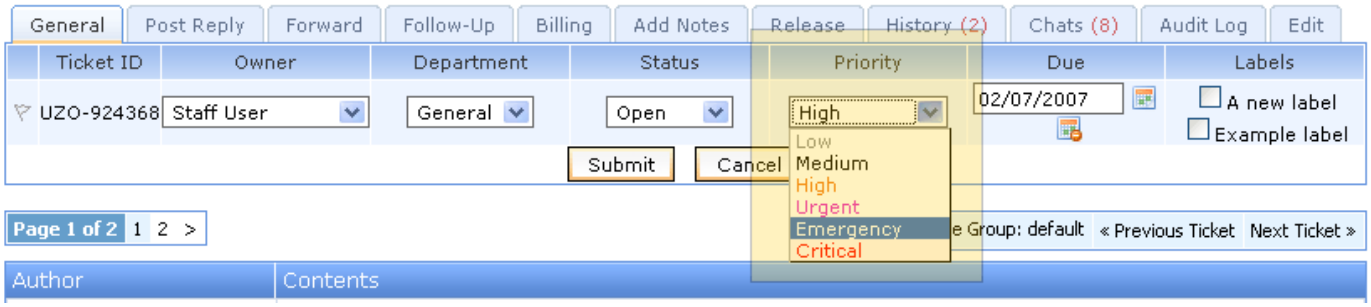
1. Select one or more tickets by checking the corresponding check-boxes.
2. On the **mass-management menu** (as shown below), click on the **Priority** menu.



3. Select a **Priority** for the ticket(s).
4. Click on the **Go** button to proceed with the changes.

To change the priority of a ticket from within a ticket view:

1. Click on the ticket's **ticket information bar** to make the bar editable, as shown below.



2. Click on the **Priority** menu.
3. Select a **Priority**.
4. Click on the **Submit** button to proceed with the changes.

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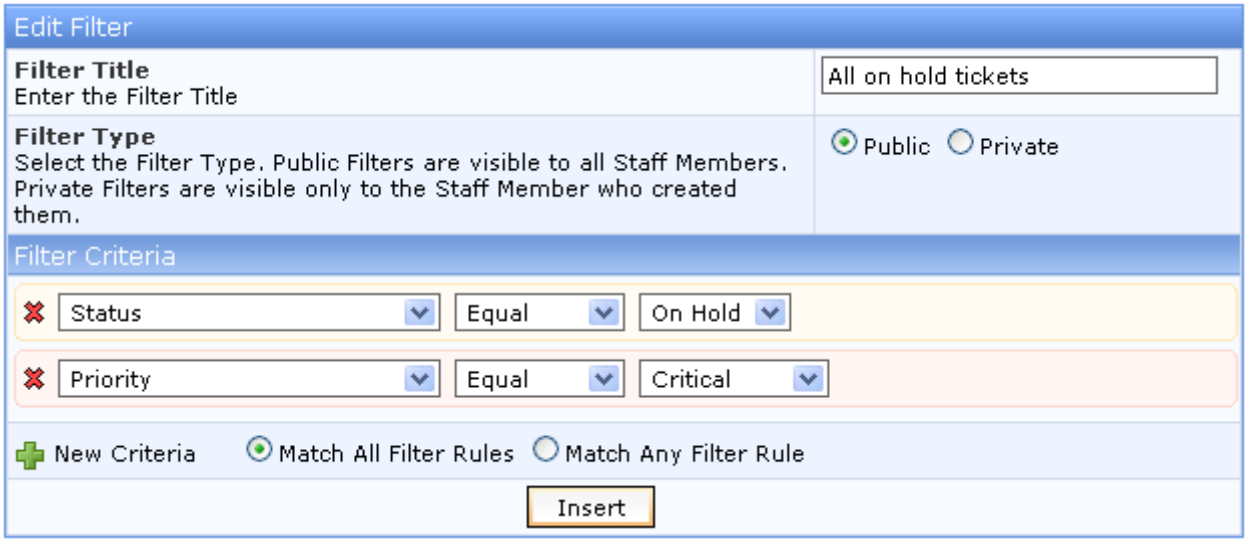
Ticket filters

Ticket filters allow you to quickly access and sort through your tickets across all departments by setting a variety of filter criteria.

Filters can be created **publicly** or **privately**. A private ticket filter is only accessible by the staff user who created it, meaning that staff members can create and manage their own ticket filters.

When created, a ticket filter will appear in the department and ticket tree. When a filter is executed (clicked on), a ticket listing of all tickets that match the filter's criteria will be displayed.

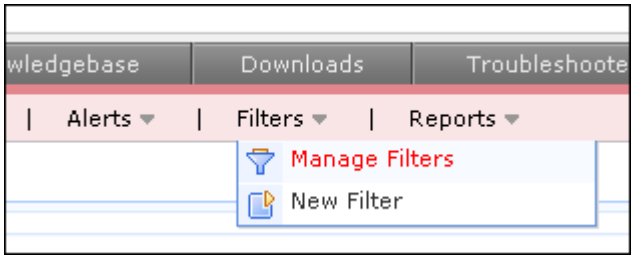
An example ticket filter is shown below. It has been created to display all tickets that have been set to "On Hold" that have a "Critical" priority:



Creating a ticket filter

To create a ticket filter:

1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **Filters** sub-menu.
3. Click **New Filter**.

You will be presented with the **Insert Filter** form, as shown below.

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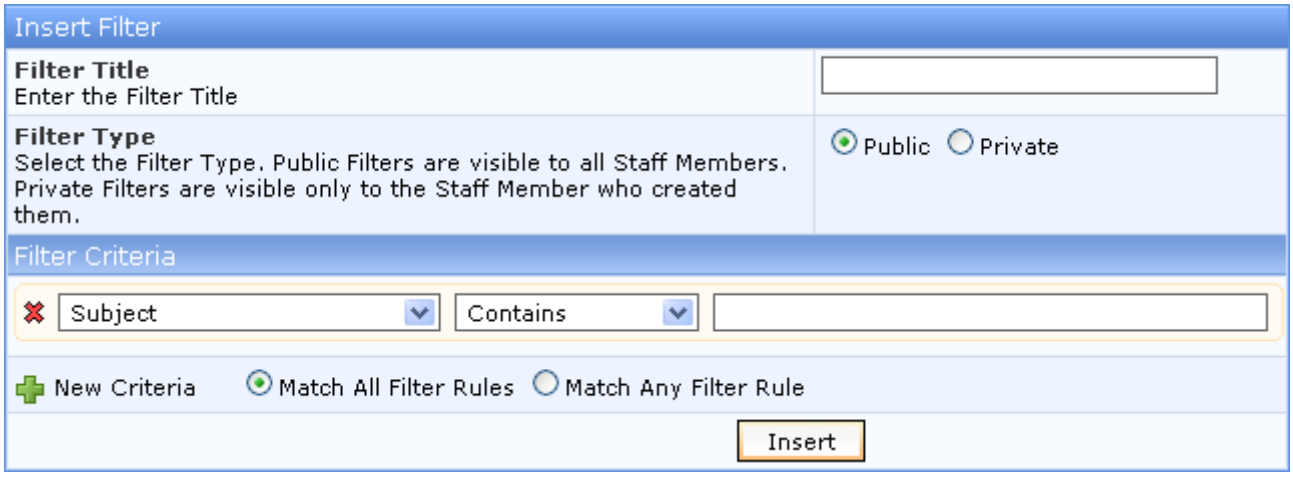

- **Filter Title** – this is the name of the filter. It will be displayed on the department and ticket tree.
- **Filter Type** – setting the filter type to public will mean all staff users will see and be able to use this ticket filter. If set to private, the filter will only be visible to the staff user who created it.
- **Filter Criteria** – criteria that tickets will be filtered by when this filter is executed.
- **Match All Filter Rules** – only tickets that match all of the criteria you have set will be listed when this filter is executed.
- **Match Any Filter Rule** – only tickets that match any of the criteria you have set will be listed when this filter is executed – if you have set three criteria and a ticket matches one of them, the ticket will still be listed.

Click on the **Insert** button to create the new filter.

Filter matching types

"Contains"

The filter will **match** if the string entered is **present anywhere** within the **field** (subject, e-mail address etc.).

Example:

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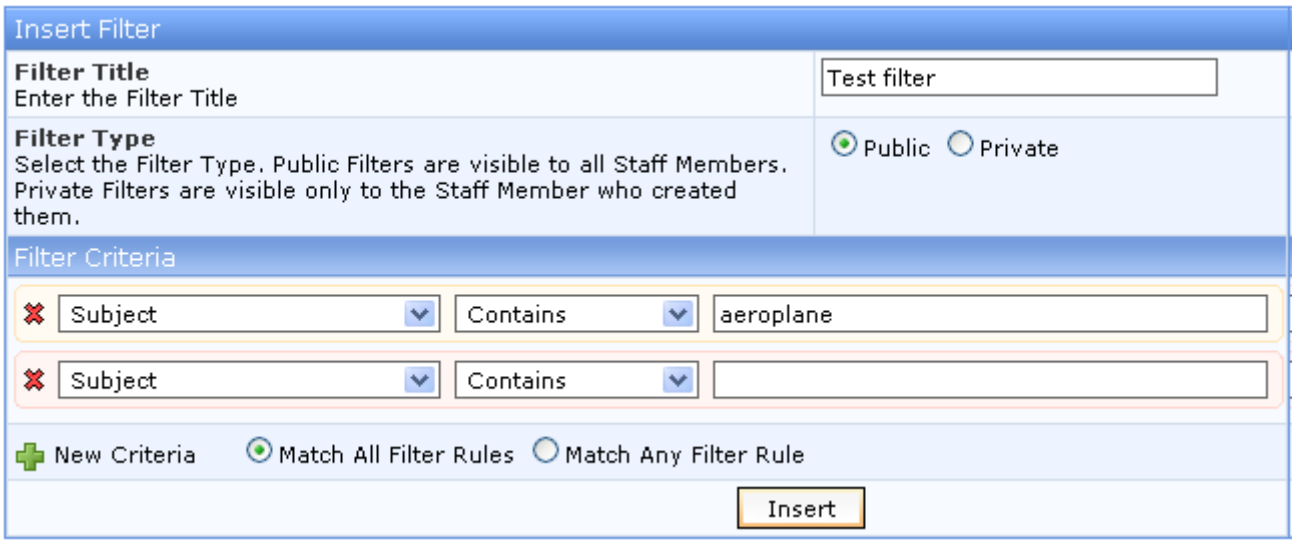

- Subject field: Regarding your website
- Filter type: Contains
- String: aeroplane
    - The filter will not match.

"Doesn't Contain"

The filter will **match** if the string entered is **not present anywhere** within the **field** (subject, e-mail address etc.).

Example:

- Subject field: Regarding your website
- Filter type: Contains
- String: website
    - The filter will not match.

"Equal"

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The filter will **match** if the string entered is **exactly the same** as the **field** (subject, e-mail address etc.).

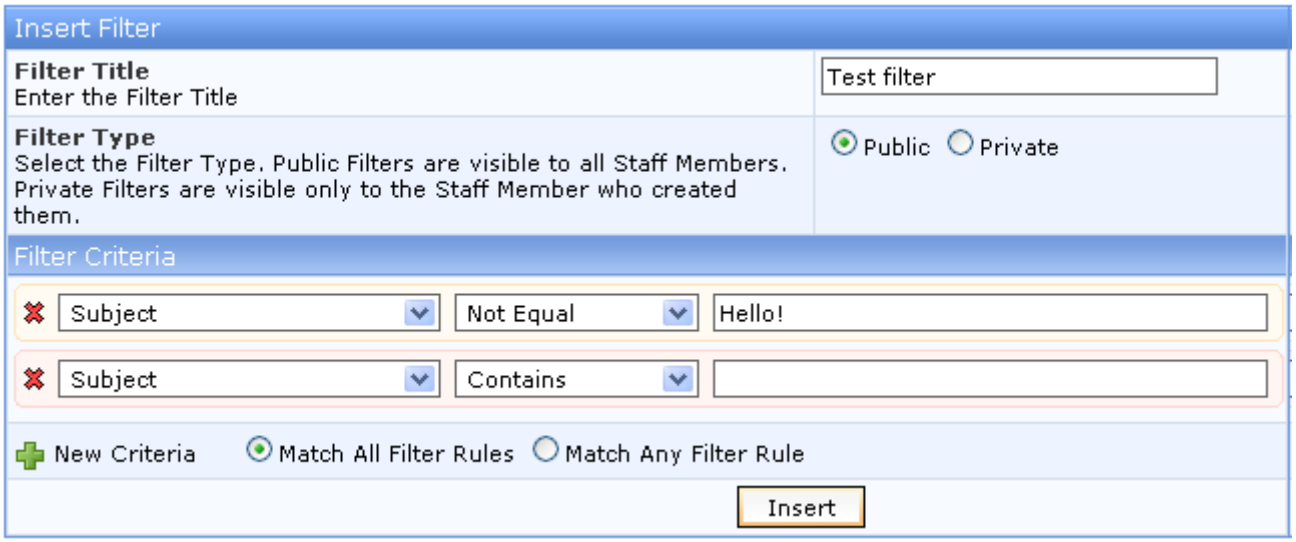
Example:

- Subject field: Regarding your website
- Filter type: Contains
- String: Regarding your website
    - The filter will match.

"Not Equal"

The filter will **match** if the string entered is **not exactly the same** as the **field** (subject, e-mail address etc.).

Example:



- Subject field: Regarding your website
- Filter type: Contains
- String: Hello!
    - The filter will match.

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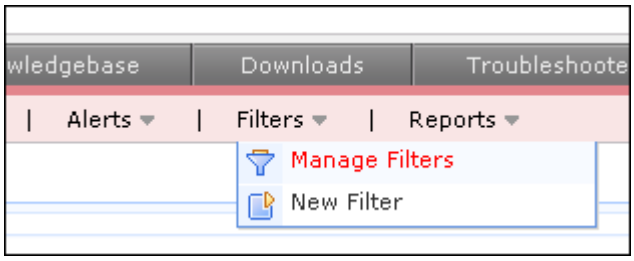
View and manage ticket filters

To manage ticket filters:

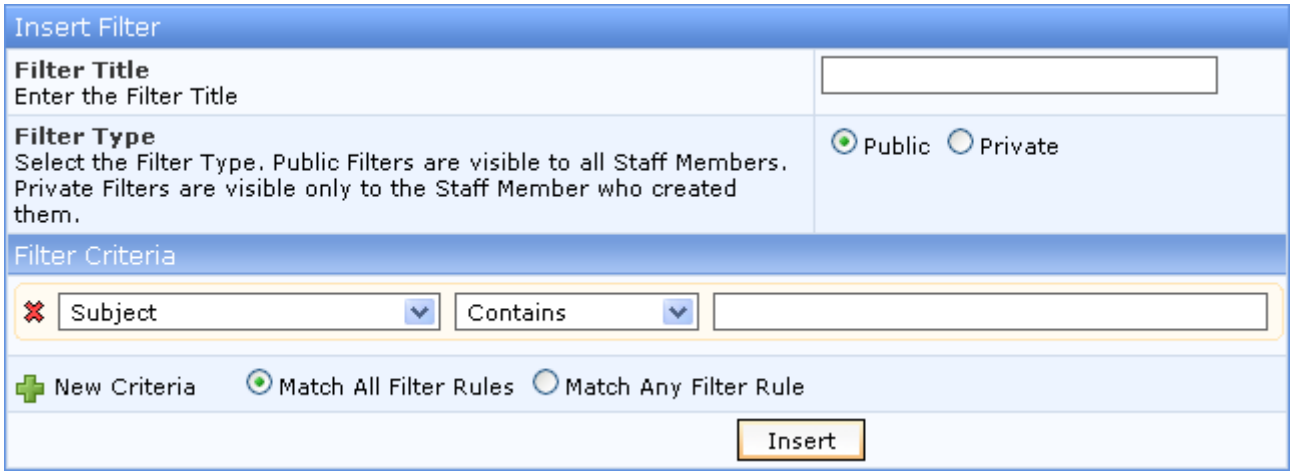
1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **Filters** sub-menu.
3. Click **Manage Filters**.

You will be presented with a list of existing filters, as shown below.

To edit a filter, click on the corresponding **Edit** button. To delete a filter, click on the corresponding **Delete** button.



Selecting multiple ticket filters (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, filters can be mass-deleted. Under the **Advanced Search** tab, filters can be searched for by name. Under the **Settings** tab, the number of filters shown per page (if there are many) can be limited.

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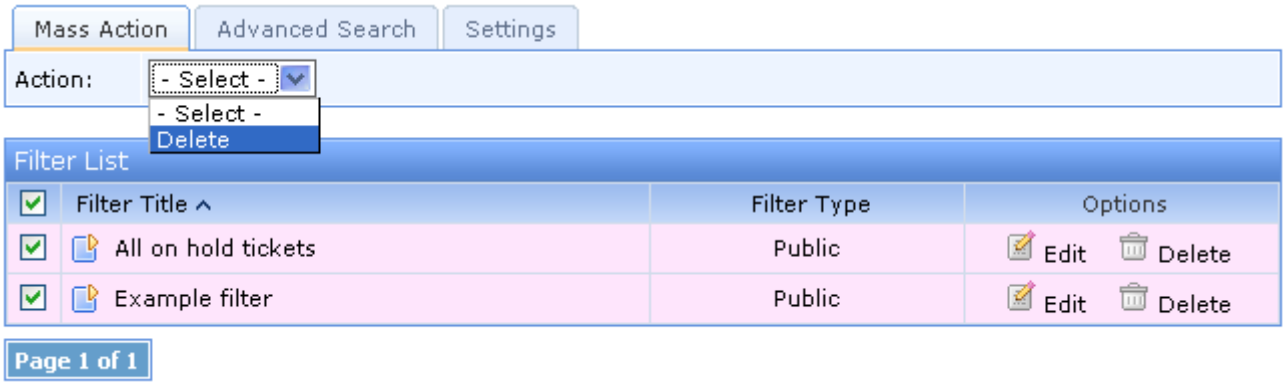
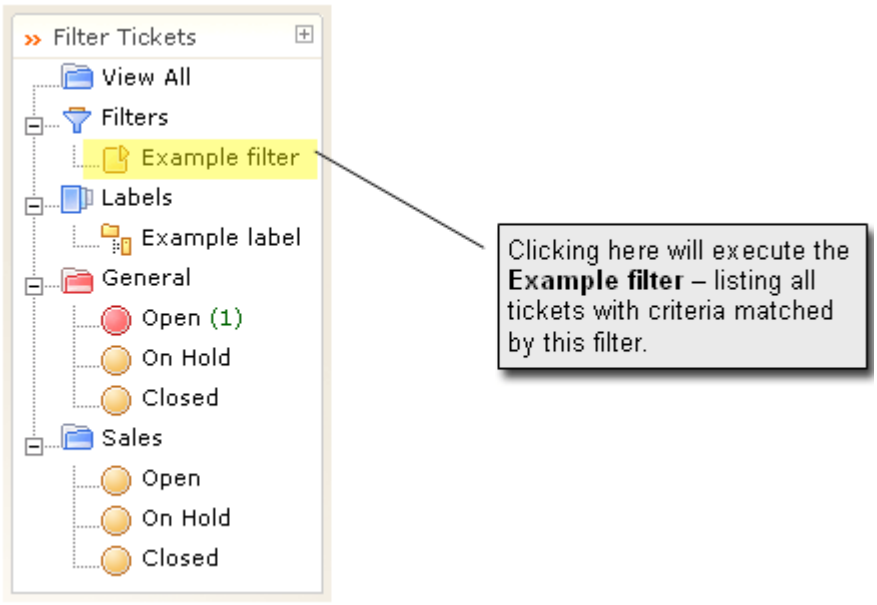


For more information on the field and criteria options for ticket filters, see creating a ticket filter.

Listing all tickets that match a filter

Ticket filters can be executed directly within the SupportSuite interface without having to create a customized view. Executing a ticket filter will list all tickets that match a filter's criteria.

1. Under the department and ticket tree (shown below), click on the **filter name** you wish to filter tickets by.



Ticket filters are created and managed within the **staff control panel**. For more information on ticket filters, see ticket filters.

Ticket labels

A ticket label can be attached to a ticket. A label can have a name and a color. When a label is attached to a ticket, the labeled ticket will have the following properties:

1. The ticket will show a **small colored indicator** on a **ticket list** corresponding to the color set for the label, as shown below.

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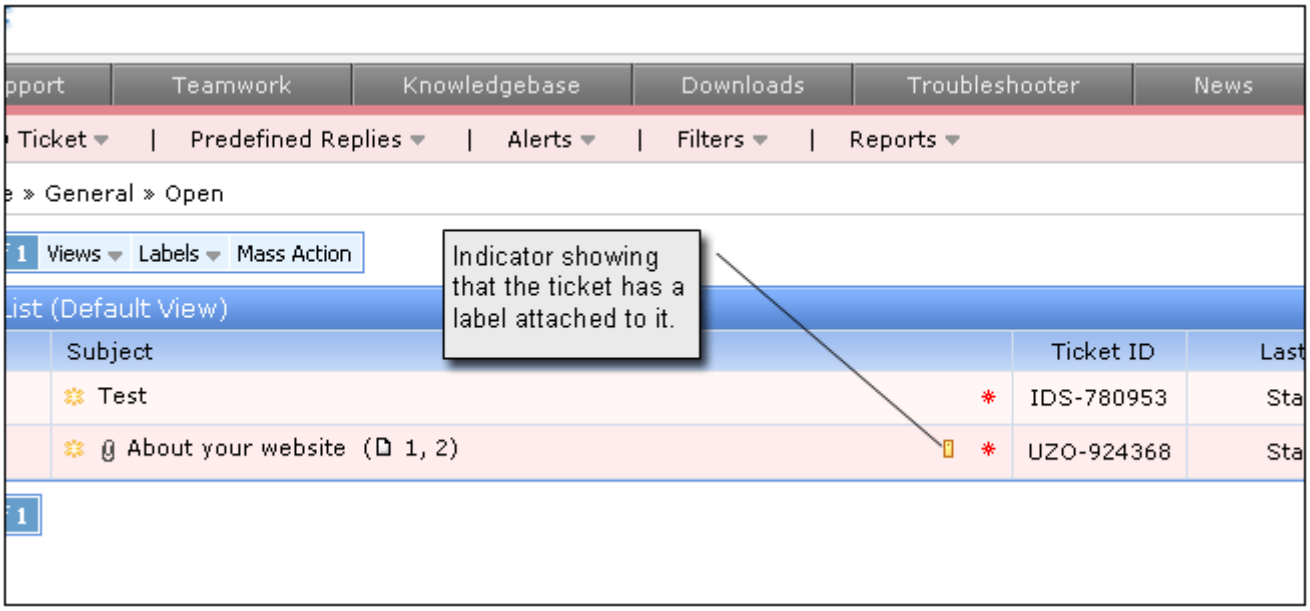
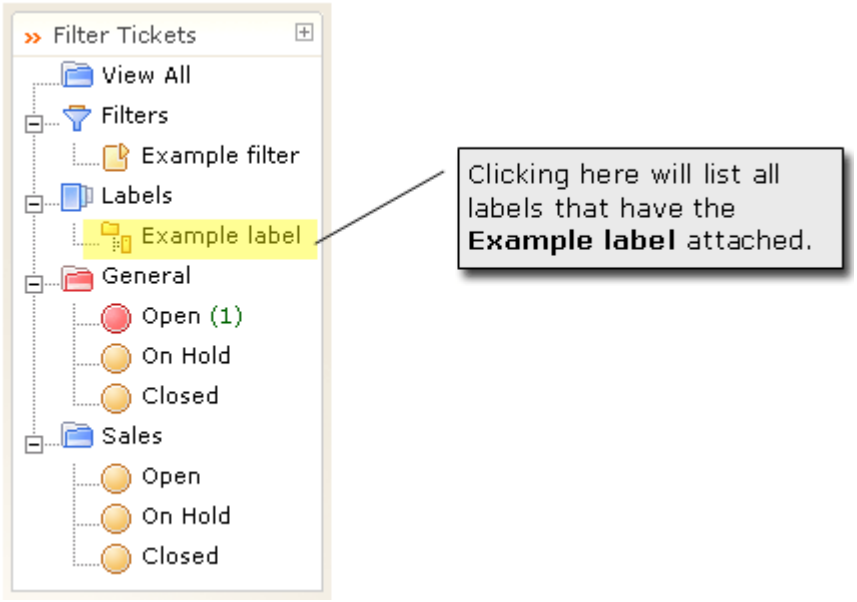


2. The ticket (among others that have had the same label attached to it) can be instantly filtered by a label via the department and ticket tree (as shown below). Clicking on a label will list all tickets that have the label attached to them.



Creating a ticket label

To create a new ticket label from within a ticket list:

1. Click on the **labels** menu above the ticket listings.
2. Type in a name for the label.

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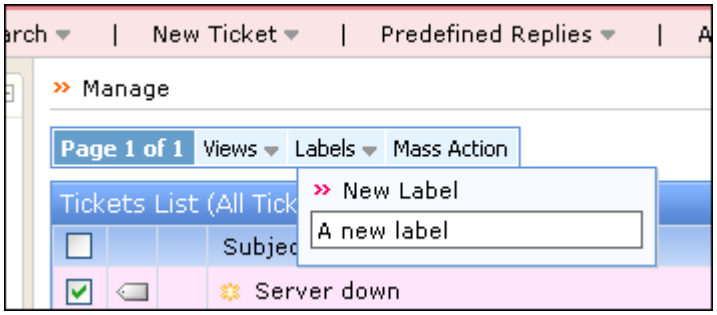
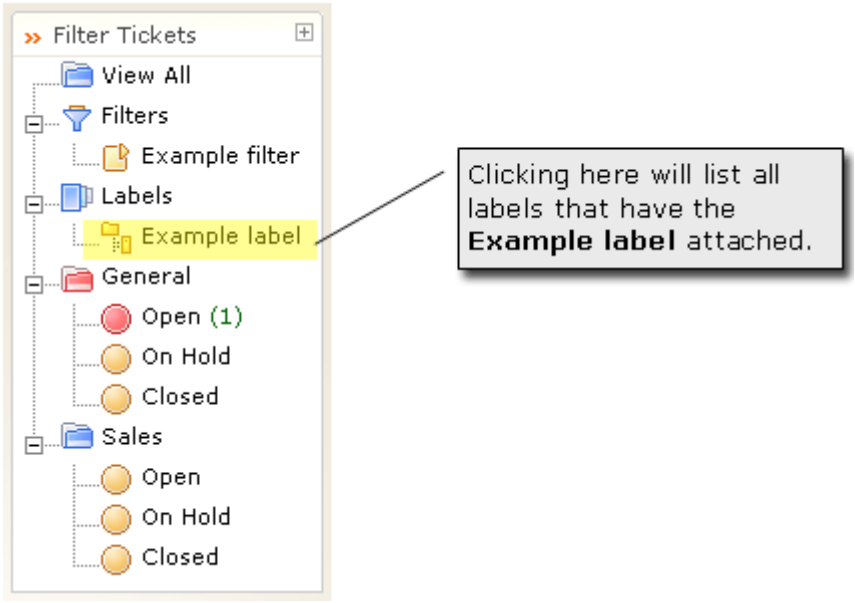


3. Press the enter key.

The page will refresh and the new label will be visible on the department and ticket tree, as shown below.



This label can now be attached to tickets.

Attaching a label to a ticket

To attach a label from within a ticket list:

1. Select the tickets you wish to attach a label to.
2. The mass-management menu bar will be opened, as shown below.

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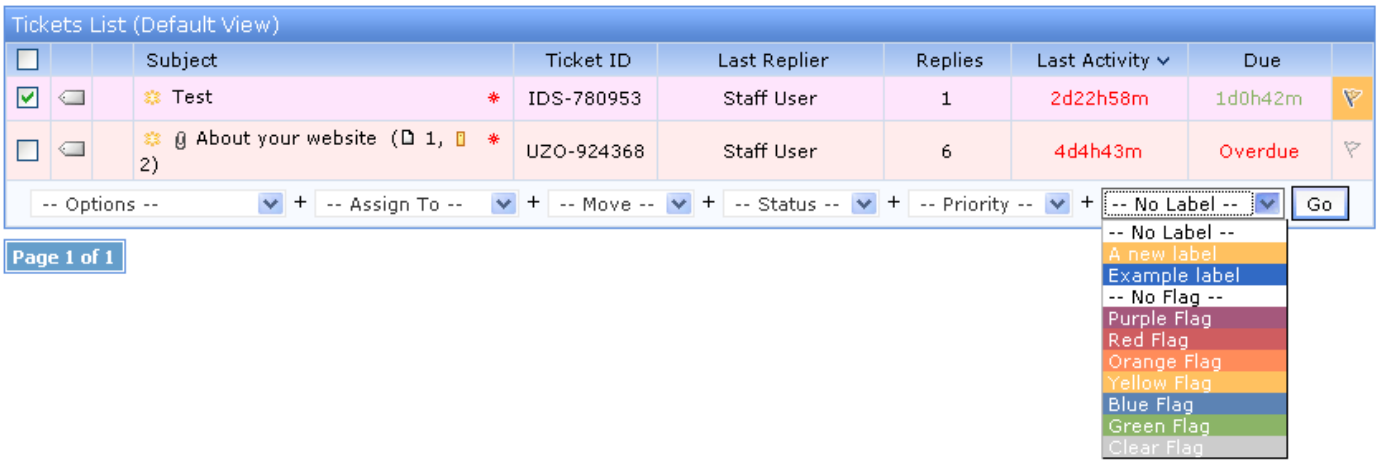
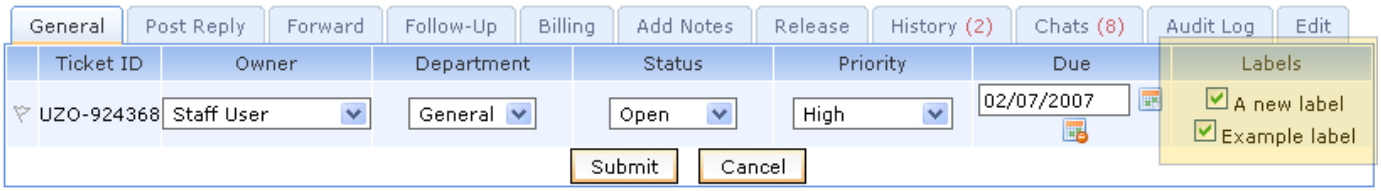


3. On the **Labels/Flags** menu, select the appropriate label.
4. Click on the **Go** button to submit the changes to the tickets.

To attach a label from within a ticket view:

1. Click on the ticket's **ticket information bar** to make the bar editable, as shown below.



2. Click on the **Labels** menu.
3. Select one or more **Labels**.
4. Click on the **Submit** button to proceed with the changes.

Going back to the ticket list, you will see that a new flag has appeared for this ticket – denoting that a label has been attached to it, as shown below.

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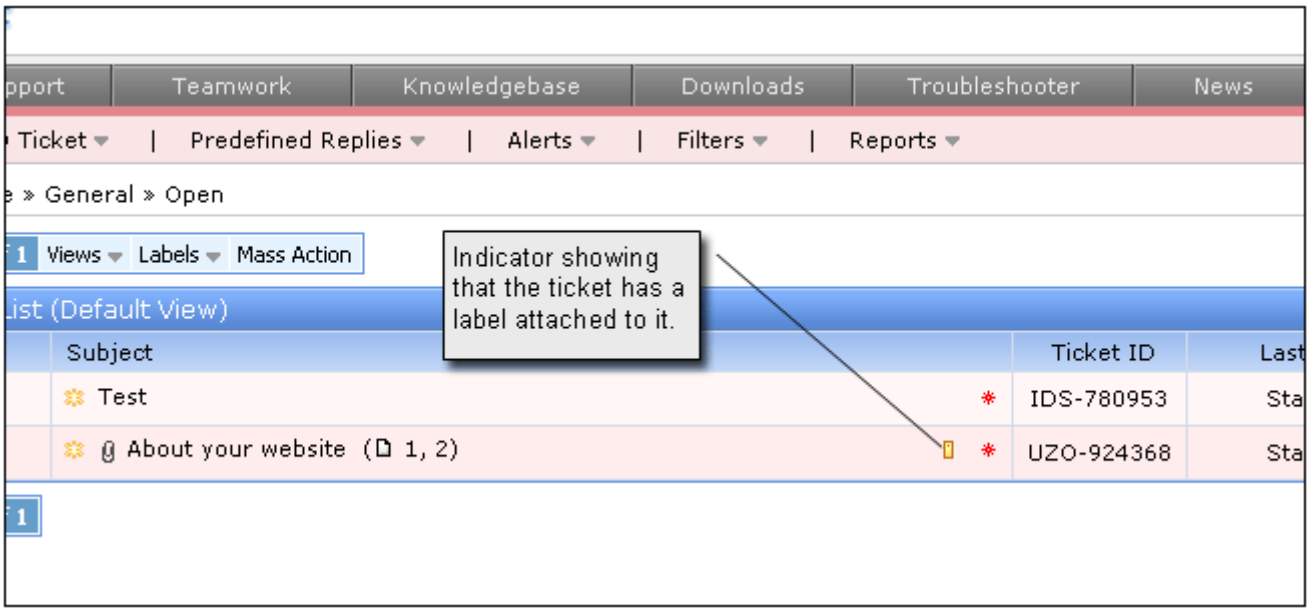
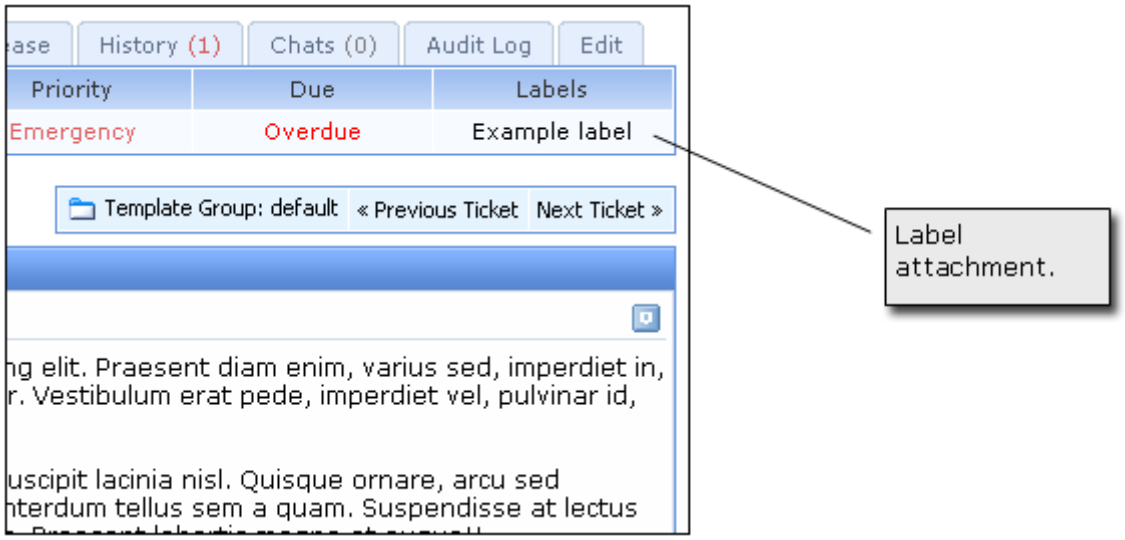


Going back to the ticket, the **ticket management menu** will now show the label(s) that were attached to the ticket, as shown below.



On the department and ticket tree, the ticket count for the **Example label** has been updated to reflect the newly attached ticket, as shown below.

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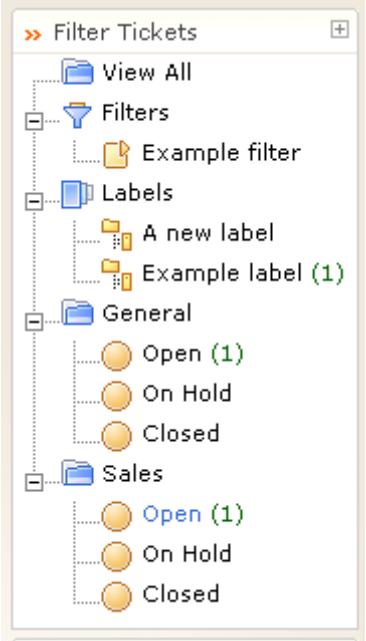
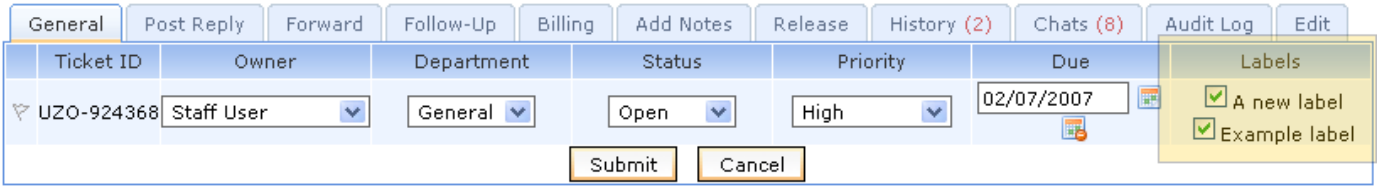


Removing a label from a ticket

Removing a label from a ticket is performed from within a ticket.

To remove a label from a ticket:

1. Click on the ticket's **ticket information bar** to make the bar editable, as shown below.



2. Click on the **Labels** menu.
3. Uncheck one or more **Labels** to remove labels.
4. Click on the **Submit** button to proceed with the changes.

Viewing tickets by label

Tickets with a **label** attached to them are directly accessible within the SupportSuite interface without having to create a customized view.

1. Under the department and ticket tree (shown below), click on the **label name** you wish to view tickets by.

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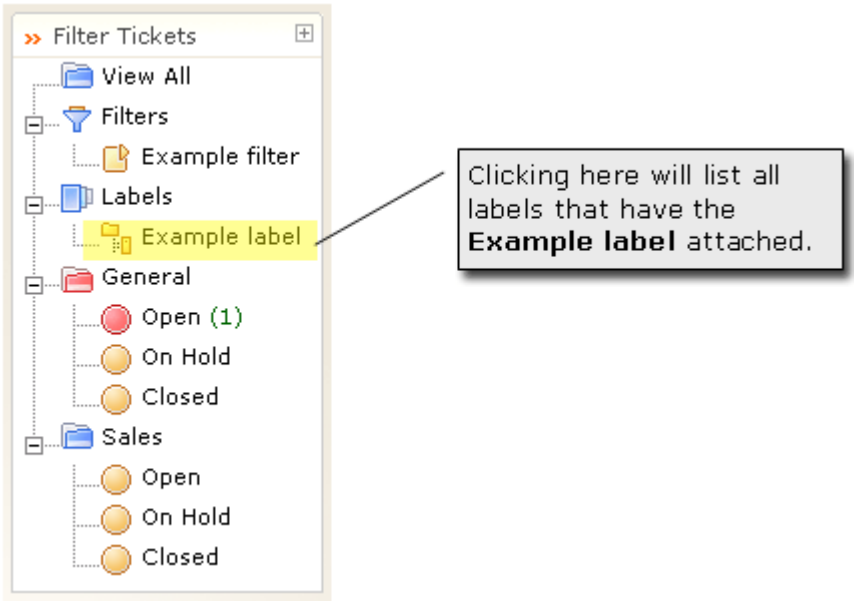


Ticket labels are created and managed within the **staff control panel**. For more information, see ticket labels.

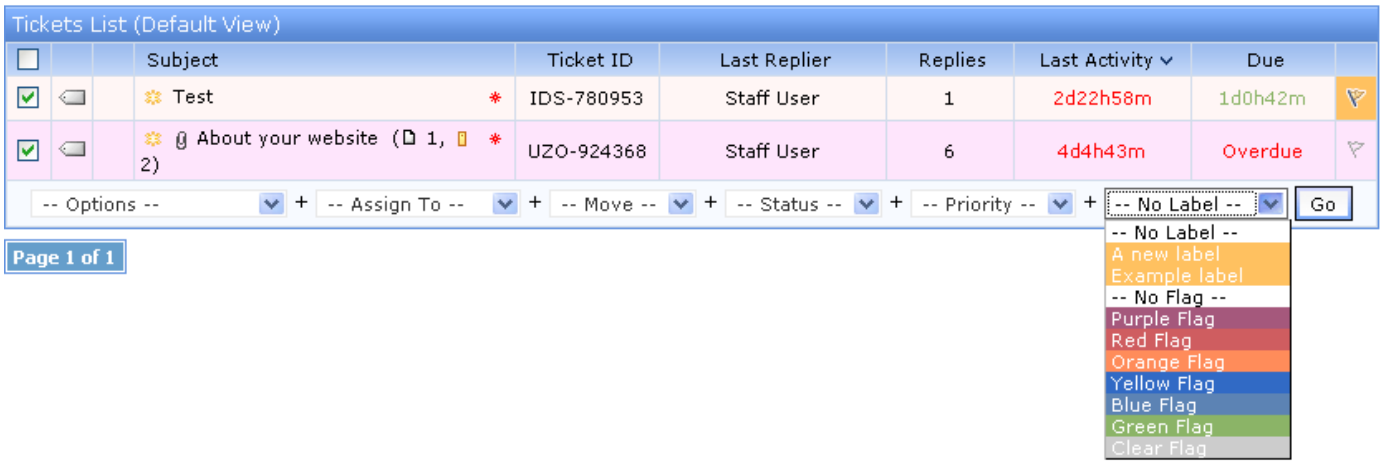
Ticket flags

A ticket can be **flagged** with a flag of a certain color. This functionality is useful for dynamically and quickly organizing tickets from within a ticket listing or ticket view.

Flagging a ticket

To flag a ticket from within a ticket list:

1. Select the tickets you wish to flag.
2. The **mass-management menu** will be opened, as shown below.



3. On the **Labels/Flags** menu, select the appropriate **Flag**.

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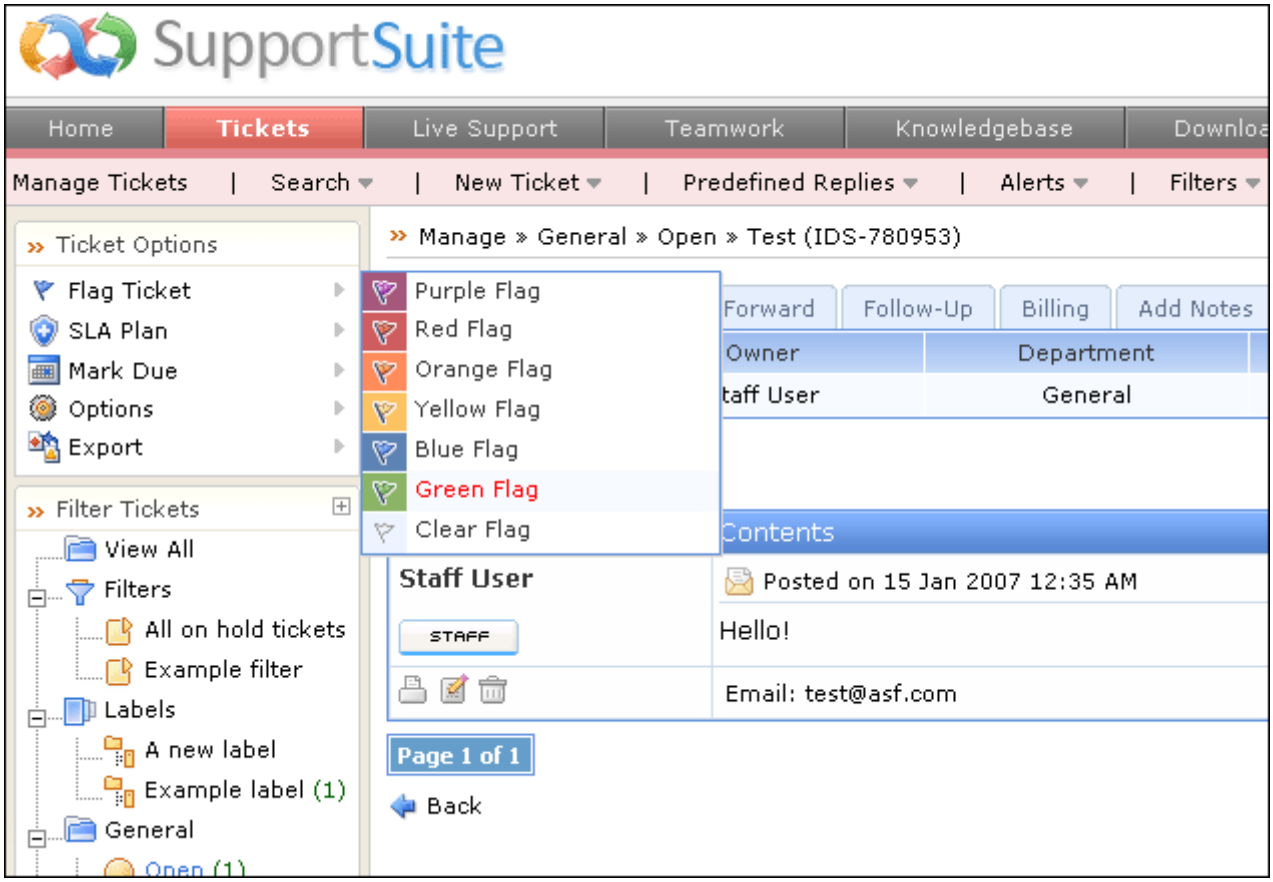
4. Click on the **Go** button to submit the changes to the tickets.

To flag a ticket from within a ticket:

1. On the **Ticket Options** menu, click **Flag Ticket** (as shown below).



2. Select the appropriate flag.

Note that the ticket information bar will now display the ticket flag, as shown below.

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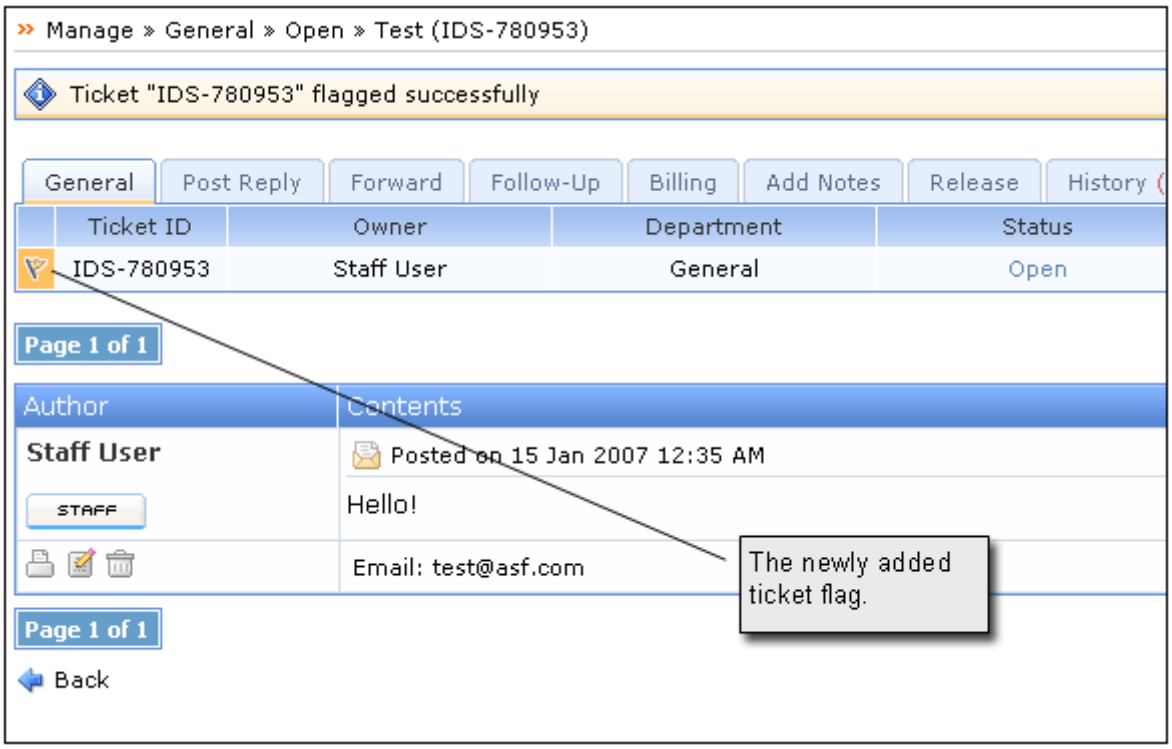
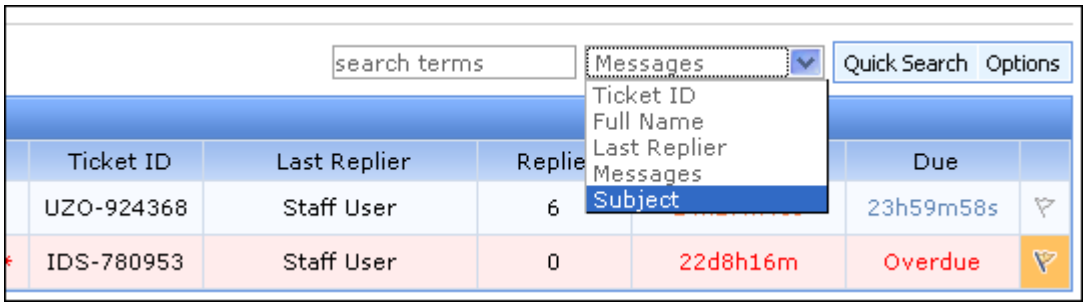


Searching tickets

Quick-search feature within a ticket listing

At the top of a ticket listing resides the **quick-search** box, as shown below.



Enter the **search terms** and then use the corresponding drop-down menu to select the **ticket field** you wish to search within.

Press the **Quick Search** button to the right of the quick-search box to perform the search.

If tickets that match your search criteria are found, a new listing of these tickets will be presented, as shown below.

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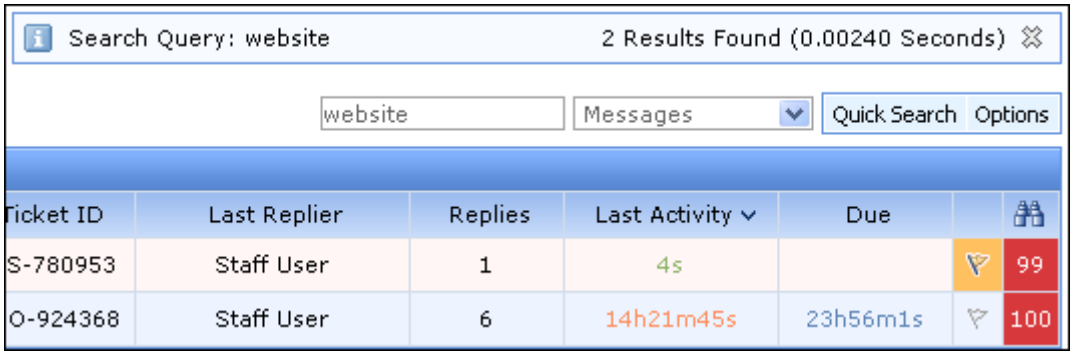
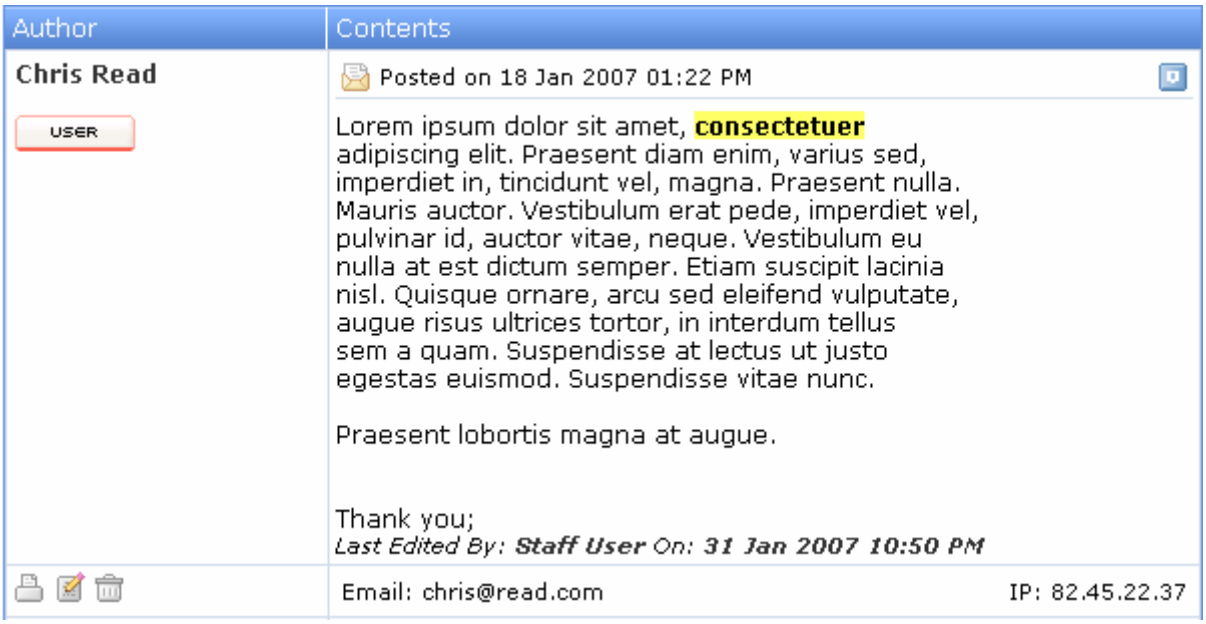


The new column added to the ticket listing (headed by the binoculars icon) indicates the **relevancy** of the ticket compared with your search terms. The higher the number, the more relevant (or a **closer match** to your search terms) the ticket is.

When opening a ticket from the search results, the **searched terms** will be highlighted. For example, a quick search was performed for the term "consectetuer", all occurrences of the word will be highlighted.


Author
Contents
Chris Read
USER
Posted on 18 Jan 2007 01:22 PM
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Praesent diam enim, varius sed, imperdiet in, tincidunt vel, magna. Praesent nulla. Mauris auctor. Vestibulum erat pede, imperdiet vel, pulvinar id, auctor vitae, neque. Vestibulum eu nulla at est dictum semper. Etiam suscipit lacinia nisl. Quisque ornare, arcu sed eleifend vulputate, augue risus ultrices tortor, in interdum tellus sem a quam. Suspendisse at lectus ut justo egestas euismod. Suspendisse vitae nunc.
Praesent lobortis magna at augue.
Thank you;
Last Edited By: Staff User On: 31 Jan 2007 10:50 PM
Email: chris@read.com
IP: 82.45.22.37

Search menu

A **search menu** is available from the navigation menu bar, as indicated below.

To access the search menu:

1. Open **Tickets** on the navigation menu bar, as shown below.
2. Open the **Search** sub-menu.

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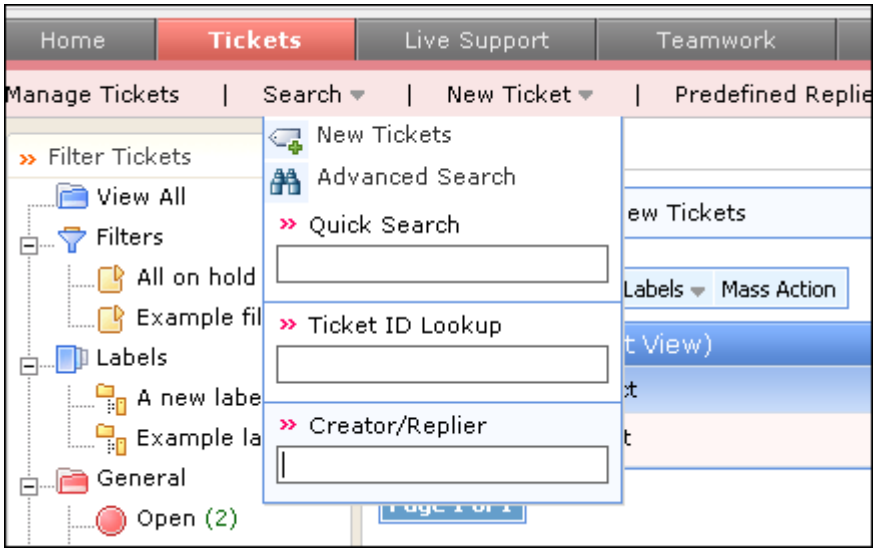
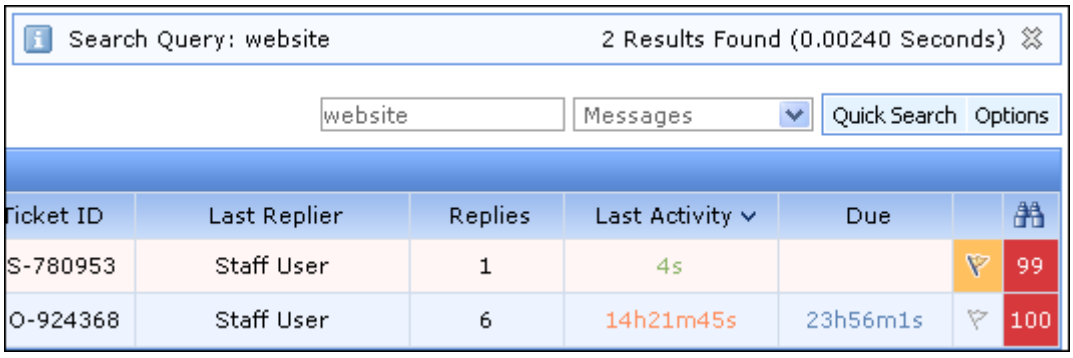


- **New Tickets** – lists all tickets that have been created or replied to since your last visit.
- **Advanced Search** – perform an advanced ticket search. For more information, see advanced search.
- **Quick Search** – quick-search all common ticket fields. Type in the required search terms followed by pressing the return key to perform a search.
- **Ticket ID Lookup** – when the ID of a ticket is known, it is possible to directly open up the ticket. Type in the ticket ID followed by pressing the return key to perform the lookup.
- **Creator/Replier** – lists all tickets created by or replied to the address of name(s) entered here. Type in your search terms followed by pressing the return key to perform the search.

If tickets that match your search criteria are found, a new listing of these tickets will be presented, as shown below.



The new column added to the ticket listing (headed by the binoculars icon) indicates the **relevancy rating** of the ticket compared with your search terms. The higher the number, the more relevant (or a **closer match** to your search terms) the ticket is.

When opening a ticket from the search results, the **searched terms** will be highlighted. For example, a quick search was performed for the term "consectetuer", all occurrences of the word will be highlighted.

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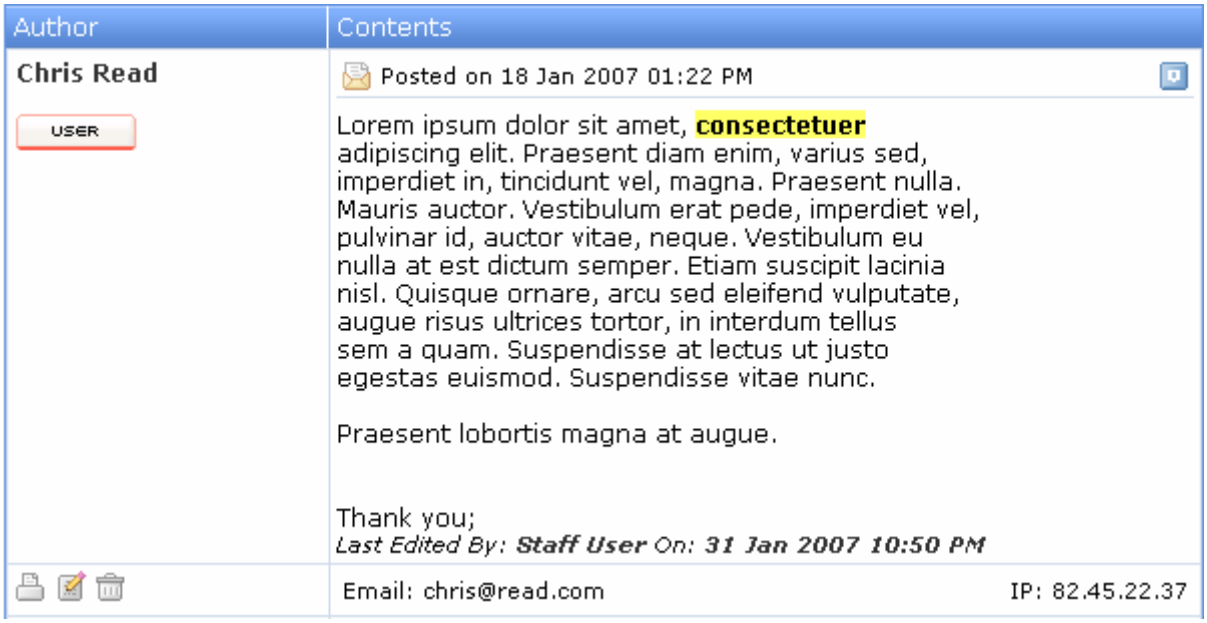
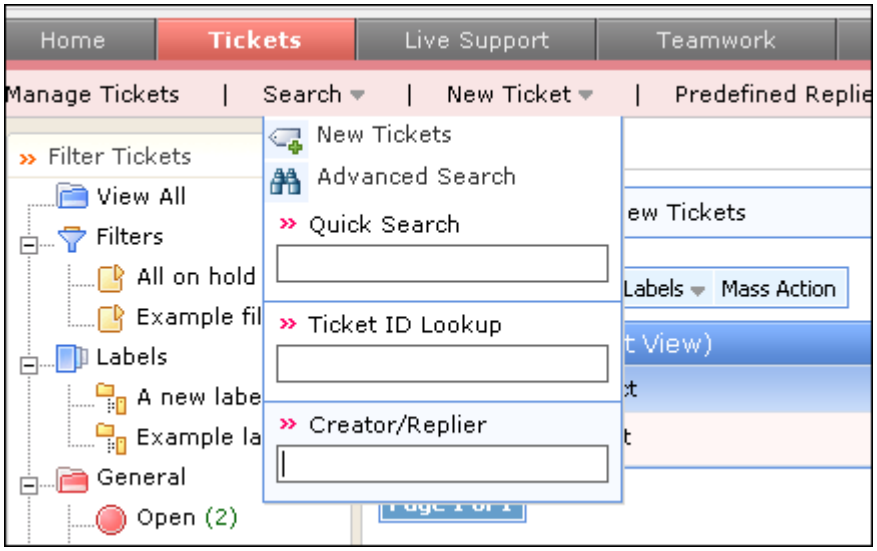

Author
Contents
Chris Read
USER
Posted on 18 Jan 2007 01:22 PM
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Praesent diam enim, varius sed, imperdiet in, tincidunt vel, magna. Praesent nulla. Mauris auctor. Vestibulum erat pede, imperdiet vel, pulvinar id, auctor vitae, neque. Vestibulum eu nulla at est dictum semper. Etiam suscipit lacinia nisl. Quisque ornare, arcu sed eleifend vulputate, augue risus ultrices tortor, in interdum tellus sem a quam. Suspendisse at lectus ut justo egestas euismod. Suspendisse vitae nunc.
Praesent lobortis magna at augue.
Thank you;
Last Edited By: Staff User On: 31 Jan 2007 10:50 PM
Email: chris@read.com
IP: 82.45.22.37

Advanced search

Advanced search is used to generate more finite search results, enabling you to further narrow your search results to speed up finding a ticket.

To open the advanced search form:

1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **Search** sub-menu.
3. Click on **Advanced Search**.

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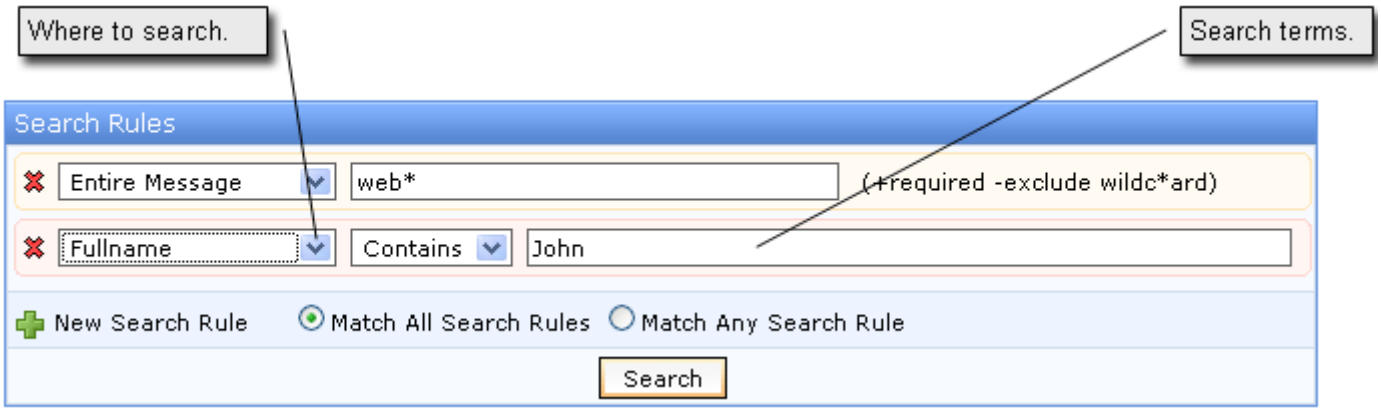
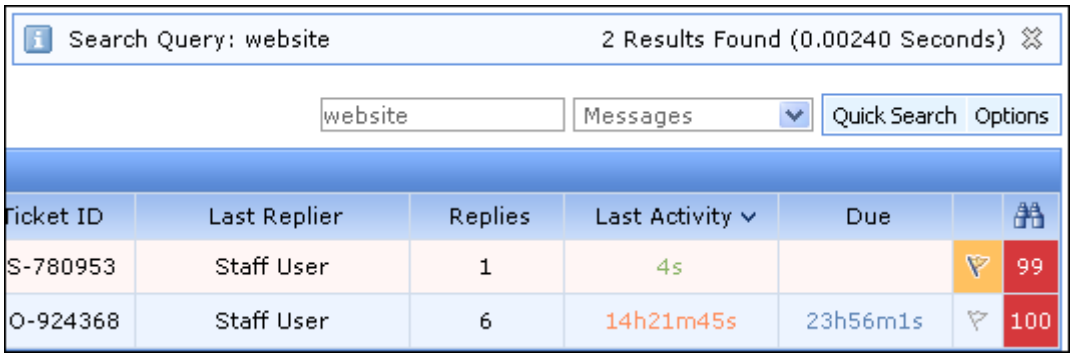


More than one search criteria can be added to the advanced search by clicking on the **New Search Rule** button, as shown above.

- **+required** – by adding a plus " + " sign to the beginning of a word (such as +hello), you indicate that the word hello **must** be included in the search field in order to match and be listed in the search results.
- **-exclude** – by adding a minus " – " sign to the beginning of a word (such as –hello), you indicate that the word hello **must not** be included in the search field in order to match and be listed in the search results.
- **wildc*ard** – searching for the term **web*** in the **Entire Message** field (an example as shown above) will match tickets that have the word web followed by anything else.
    - The following terms **would** be matched by the **web*** search term:
        - website
        - webwonder
        - webweb
    - The following terms **would not** be matched by the **web*** search term:
        - worldwideweb
        - hellowebhello

Click on the **Search** button to perform the advanced search.

If tickets that match your search criteria are found, a new listing of these tickets will be presented, as shown below.



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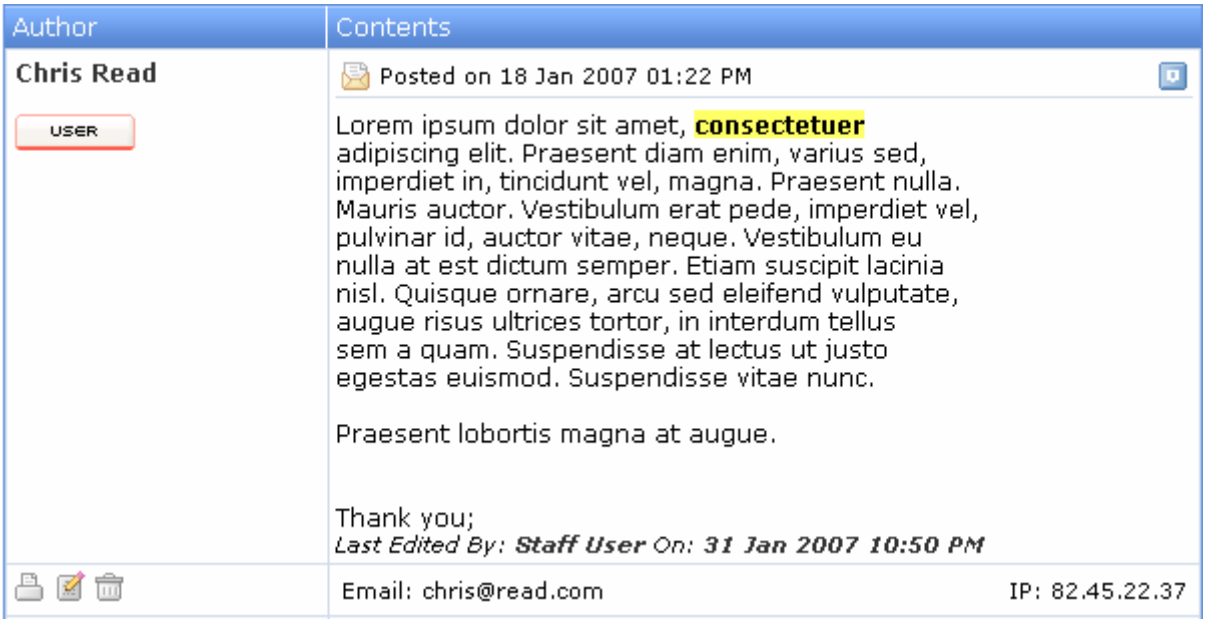
The new column added to the ticket listing (headed by the binoculars icon) indicates the **relevancy rating** of the ticket compared with your search terms. The higher the number, the more relevant (or a **closer match** to your search terms) the ticket is.

When opening a ticket from the search results, the **searched terms** will be highlighted. For example, a quick search was performed for the term "consectetuer", all occurrences of the word will be highlighted.


Author
Contents
Chris Read
USER
Posted on 18 Jan 2007 01:22 PM
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Praesent diam enim, varius sed, imperdiet in, tincidunt vel, magna. Praesent nulla. Mauris auctor. Vestibulum erat pede, imperdiet vel, pulvinar id, auctor vitae, neque. Vestibulum eu nulla at est dictum semper. Etiam suscipit lacinia nisl. Quisque ornare, arcu sed eleifend vulputate, augue risus ultrices tortor, in interdum tellus sem a quam. Suspendisse at lectus ut justo egestas euismod. Suspendisse vitae nunc.
Praesent lobortis magna at augue.
Thank you;
Last Edited By: Staff User On: 31 Jan 2007 10:50 PM
Email: chris@read.com
IP: 82.45.22.37

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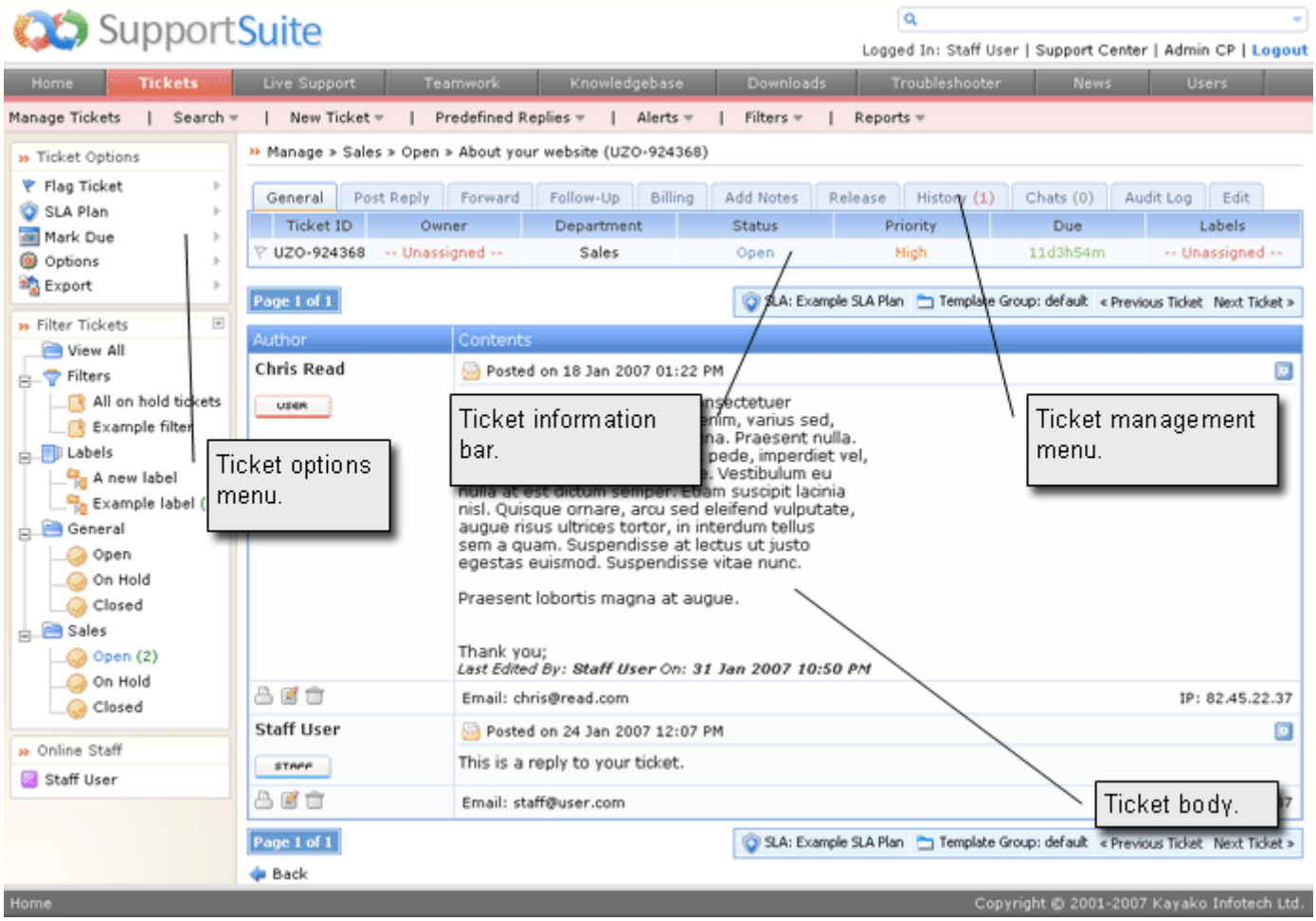
Ticket handling

Viewing and managing a ticket

From within a ticket list, click on a ticket's subject to access the **ticket view**. You will then be presented with an interface similar to the following, shown below.



1. Ticket options menu.
2. Ticket body.
3. Ticket management menu and ticket information bar.

Ticket options menu

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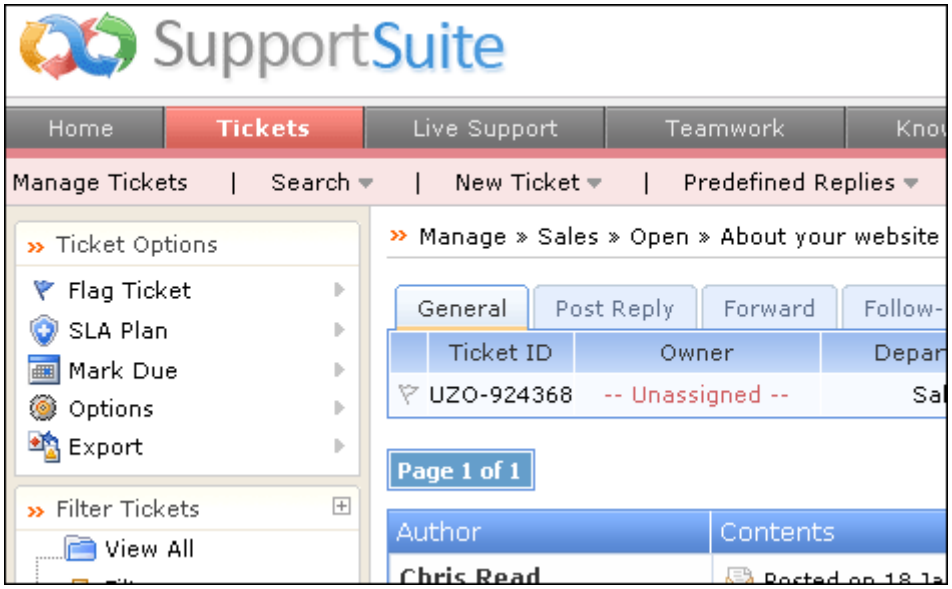
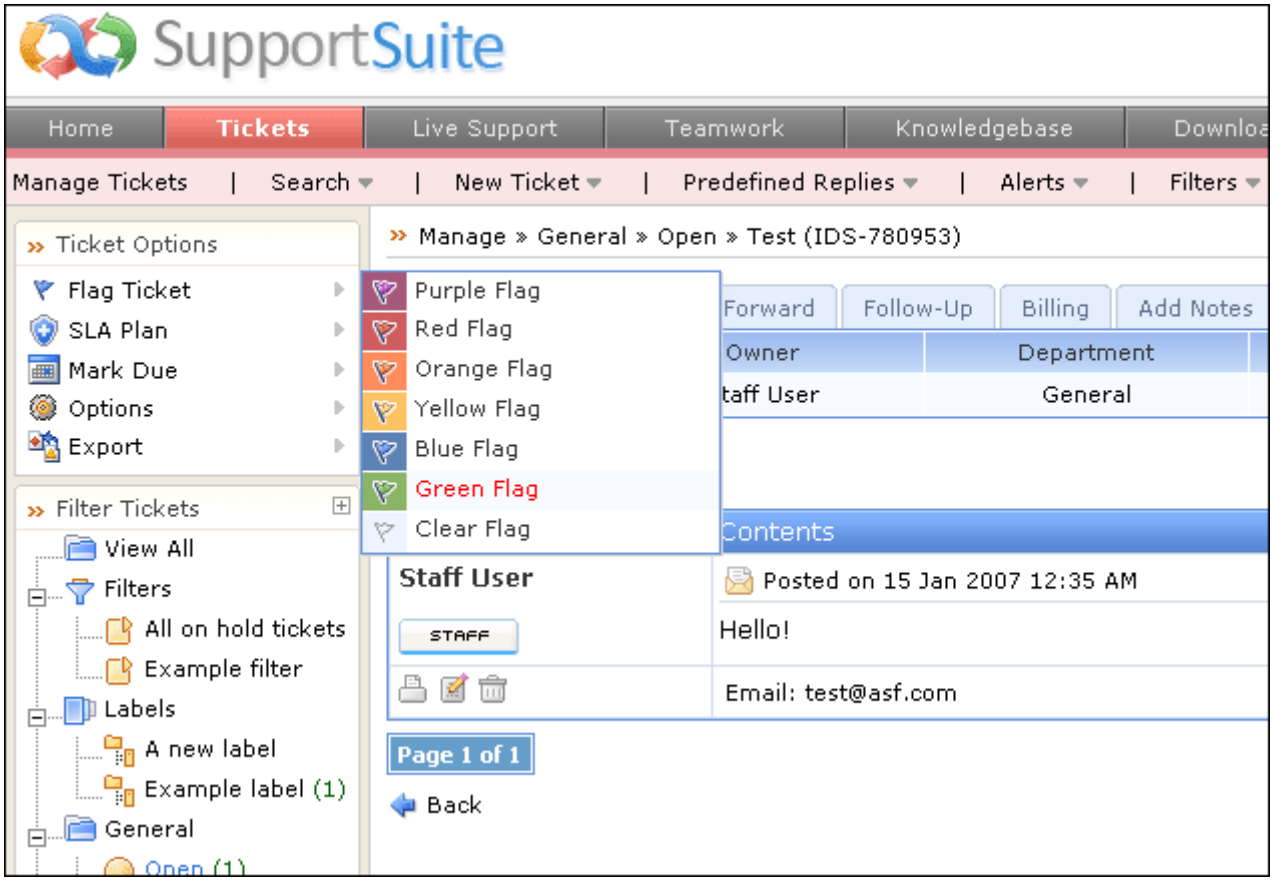


Flag ticket

Clicking on this menu will open a list of available flags that can be used to flag the opened ticket, as shown below. For more information on ticket flags, see ticket flags.



SLA Plan

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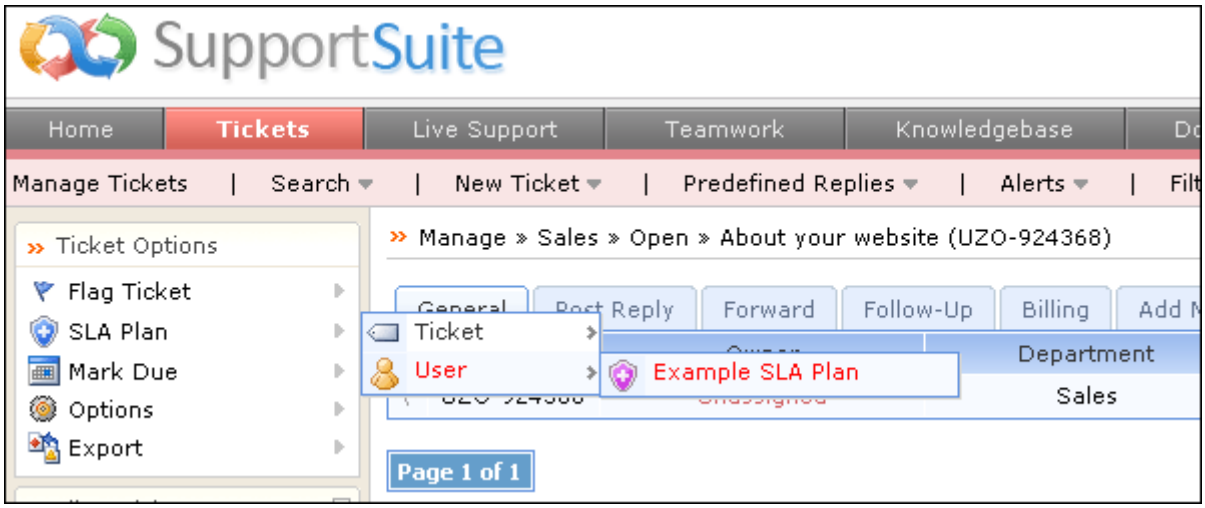
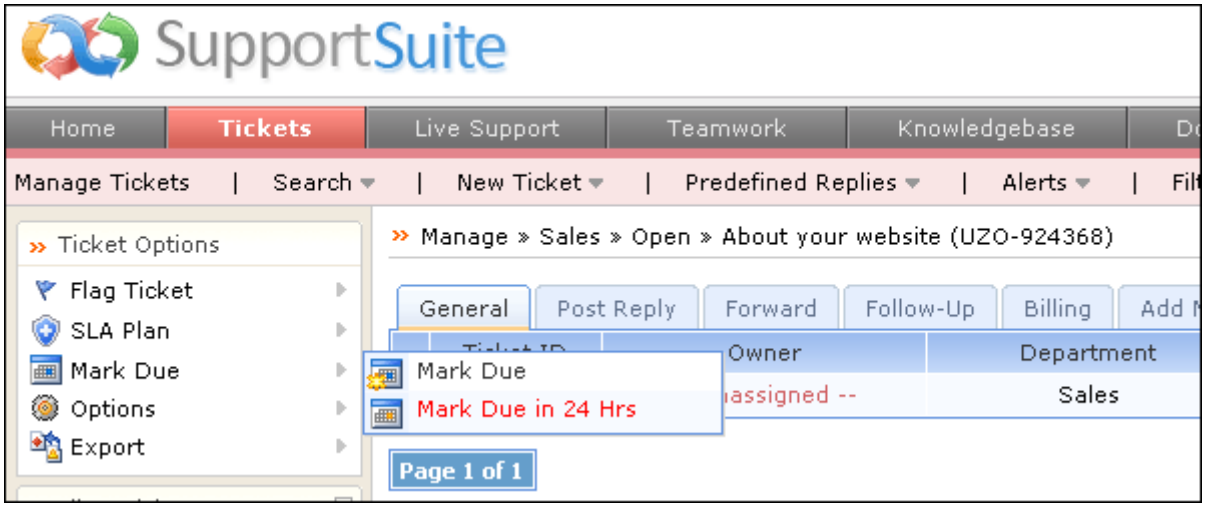
The SLA Plan menu allows you to assign an SLA plan to the user who created the ticket or to the ticket itself, as shown below. For more information, see SLA in the administrator control panel.



Mark due

Clicking on this menu will allow you to quickly set the **due time** ("now" or "In 24 Hours") for which a response or resolution to the ticket is due, as shown below. For more information on due times and details on how to set a specific due time, see Ticket Due Times.



Options

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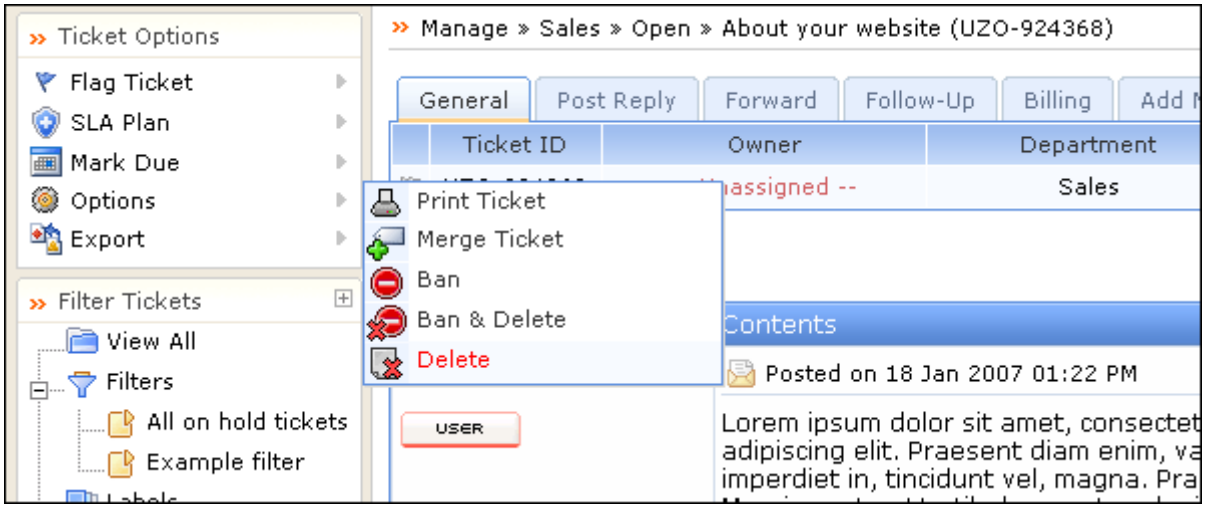
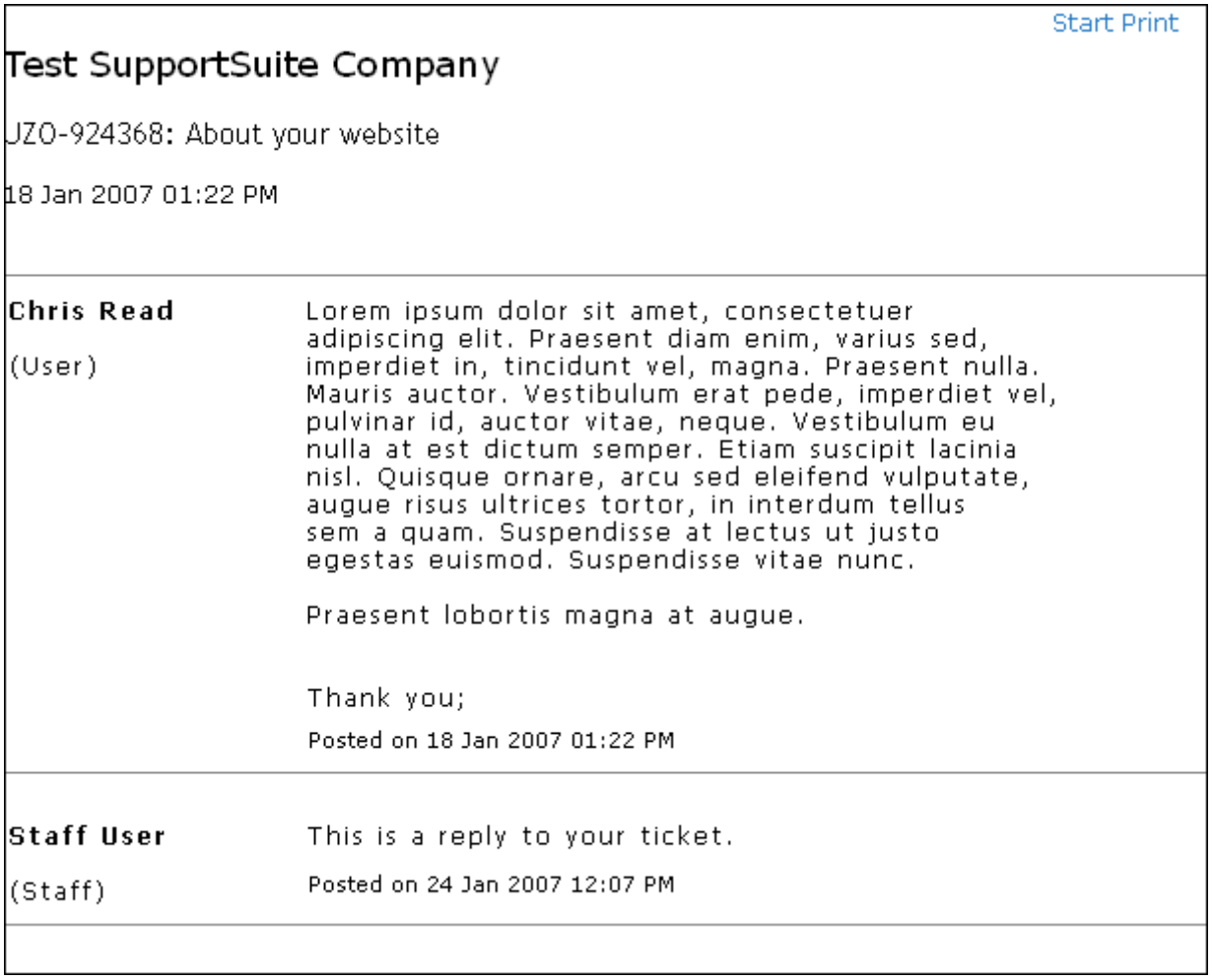


Clicking on this menu choice will introduce a series of ticket options.

Print Ticket – clicking this menu choice will open a new browser window featuring the ticket, its details and all replies in a printer-friendly format, as shown below.



Start Print

Test SupportSuite Company

JZO-924368: About your website

18 Jan 2007 01:22 PM

Chris Read
(User)

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Praesent diam enim, varius sed, imperdiet in, tincidunt vel, magna. Praesent nulla. Mauris auctor. Vestibulum erat pede, imperdiet vel, pulvinar id, auctor vitae, neque. Vestibulum eu nulla at est dictum semper. Etiam suscipit lacinia nisl. Quisque ornare, arcu sed eleifend vulputate, augue risus ultrices tortor, in interdum tellus sem a quam. Suspendisse at lectus ut justo egestas euismod. Suspendisse vitae nunc.

Praesent lobortis magna at augue.

Thank you;

Posted on 18 Jan 2007 01:22 PM

Staff User
(Staff)

This is a reply to your ticket.

Posted on 24 Jan 2007 12:07 PM

Merge Ticket – opens up the ticket's edit pane, in which you can enter the ID of another ticket to which the current ticket will be merged.

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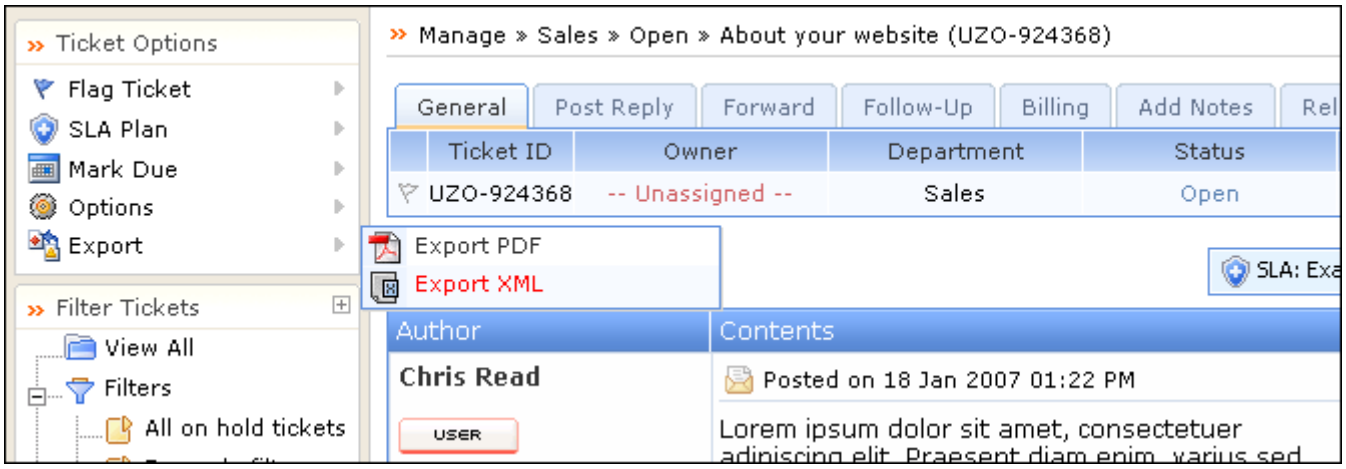
Ban – adds the ticket creator's e-mail address to the ban list (managed within the administrator control panel). No more e-mails or tickets raised form this e-mail address will be received by the system.

Ban and Delete – performs the same function as the Ban option as well as deleting the entire ticket. Deleting a ticket is irreversible.

Delete – deletes the ticket from the database. This option is irreversible.

Export



Export PDF – generates a PDF version of the ticket details and replies, as shown below.

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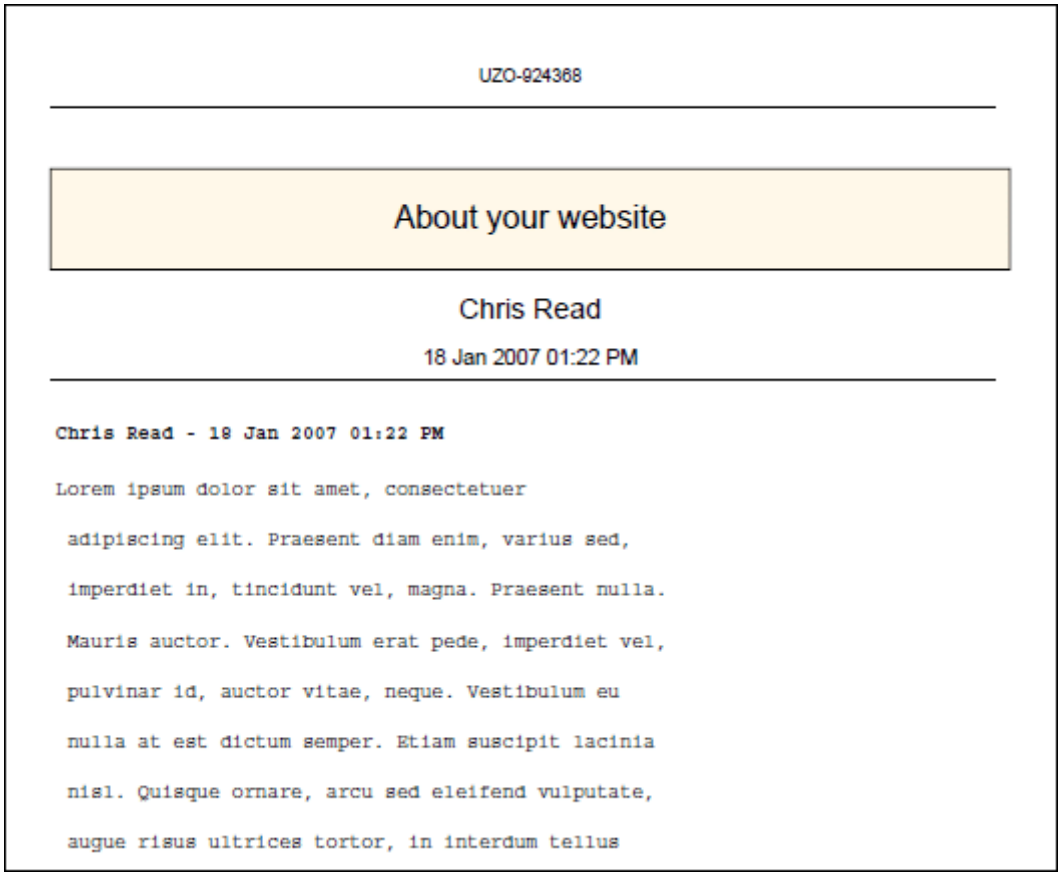

UZO-924368

About your website

Chris Read

18 Jan 2007 01:22 PM

Chris Read - 18 Jan 2007 01:22 PM

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Praesent diam enim, varius sed, imperdiet in, tincidunt vel, magna. Praesent nulla. Mauris auctor. Vestibulum erat pede, imperdiet vel, pulvinar id, auctor vitae, neque. Vestibulum eu nulla at est dictum semper. Etiam suscipit lacinia nisl. Quisque ornare, arcu sed eleifend vulputate, augue risus ultrices tortor, in interdum tellus

Export XML – exports an XML data file of the ticket details and replies, as shown below.

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```
<?xml version="1.0" encoding="UTF-8" ?>
<!--  XML Generated On: 01 Feb 2007 04:55 PM  -->
- <ticket>
  - <ticketid>
      <![CDATA[ 2  ]]>
    </ticketid>
  - <ticketmaskid>
      <![CDATA[ UZO-924368  ]]>
    </ticketmaskid>
  - <departmentid>
      <![CDATA[ 3  ]]>
    </departmentid>
  - <department>
      <![CDATA[ Sales  ]]>
    </department>
  - <ticketstatusid>
      <![CDATA[ 1  ]]>
    </ticketstatusid>
  - <ticketstatus>
      <![CDATA[ Open  ]]>
    </ticketstatus>
  - <priorityid>
      <![CDATA[ 3  ]]>
    </priorityid>
  - <priority>
```

Ticket body

The figure below details a typical **ticket reply** post body.

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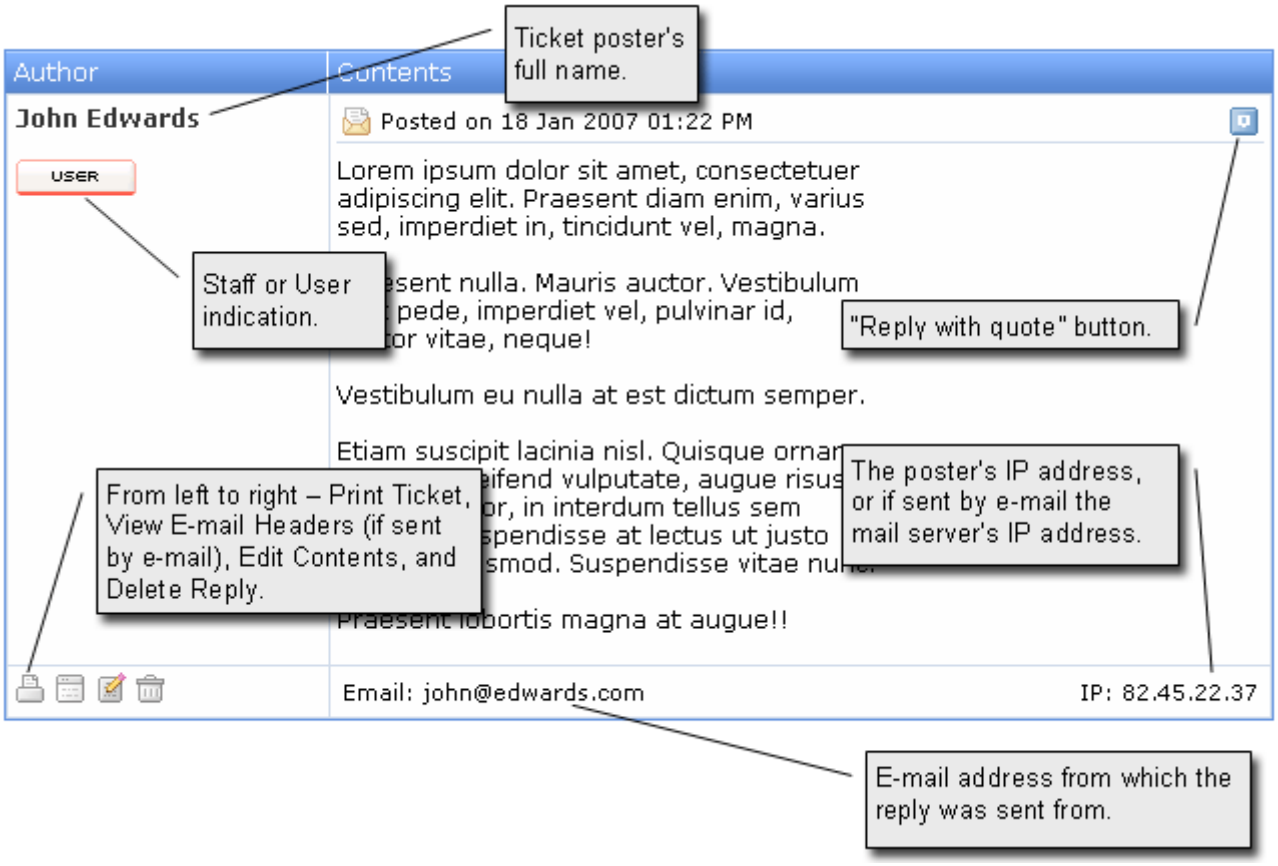
Author
Contents
John Edwards
Posted on 18 Jan 2007 01:22 PM
USER
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Praesent diam enim, varius sed, imperdiet in, tincidunt vel, magna.
Vestibulum eu nulla at est dictum semper.
Email: john@edwards.com
IP: 82.45.22.37
Ticket poster's full name.
Staff or User indication.
"Reply with quote" button.
From left to right – Print Ticket, View E-mail Headers (if sent by e-mail), Edit Contents, and Delete Reply.
The poster's IP address, or if sent by e-mail the mail server's IP address.
E-mail address from which the reply was sent from.

- **Reply-with-quote button** – clicking this button will take you directly to the ticket reply interface with the contents of the ticket reply quoted.
- **IP address –** the IP address of the user who created the reply. If the ticket reply was received via **e-mail**, the IP address here will represent the address of the sending mail server.
- **Ticket reply functions**
  - **Print reply** - opens and prints a printer-friendly view of the ticket reply.
  - **E-mail headers** - if the reply was received via e-mail, this icon will be available and will open up a view of the raw e-mail headers stored for the ticket reply.
  - **Edit reply** - edit the contents of the ticket reply.
  - **Delete reply** - delete the ticket reply.
- **User status**
  - STAFF - user is a **staff user**.
  - USER - user is a regular **client user**.
  - THIRD PARTY - user is a **third party**.
  - RECIPIENT - user is a **recipient**.

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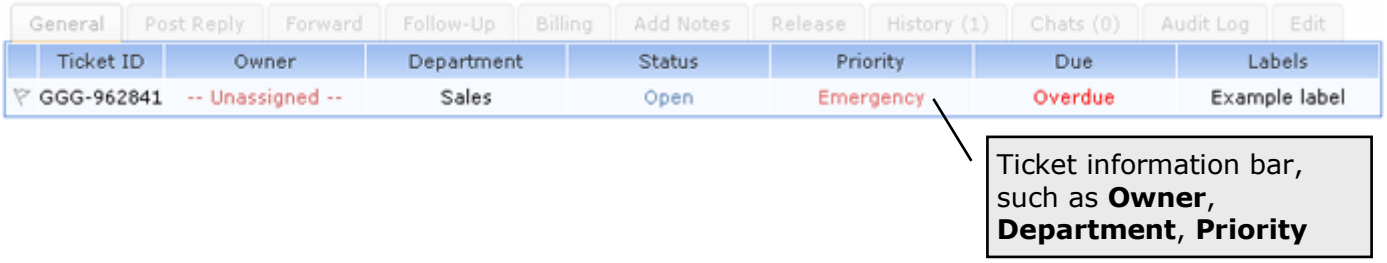
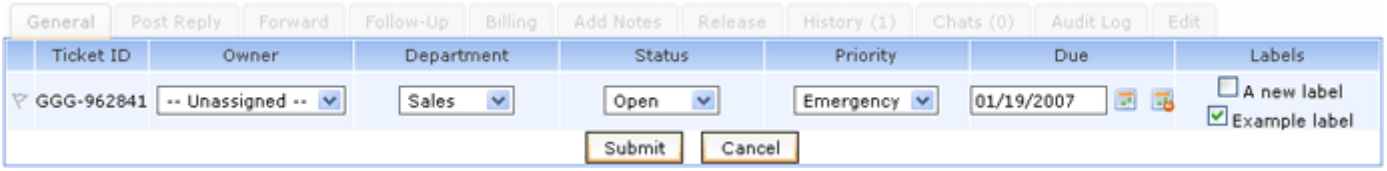
Ticket information bar

Note – the tabs of the ticket management menu have been grayed out for the purposes of this

The ticket management menu consists of a series of clickable tabs that allow you to perform all ticket related functions for the ticket currently in view.



Clicking on the **ticket information bar** (as indicated above) will transform the information bar into an editable version, as shown below.



The editable interface allows for the editing of the following ticket properties:

Owner – change the owner (staff user) of a ticket (also known as ticket assignment).

Department – change the department the ticket resides in.

Status – change the status the ticket is set to. For more information on statuses, see Ticket Status.

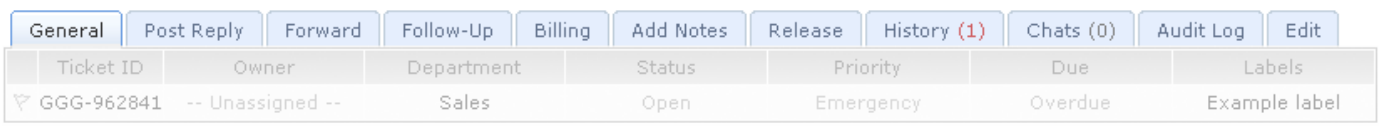
Priority – change the priority of the ticket. For more information on priorities, see Ticket Priority.

Due – the date and time at which the ticket is due by. For more information on ticket due times, see Ticket Due Times.

Labels – attach or remove labels to the ticket. For more information on labels, see Ticket Labels.

Ticket management menu

Note – the tabs of the ticket information bar have been grayed out for the purposes of this



- **General** – the general tab calls up the ticket information bar.

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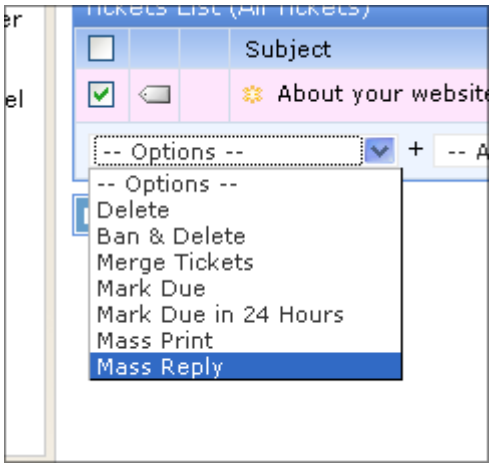
- **Post Reply** – the post reply tab will introduce the reply interface.
- **Forward** – the forward tab calls up forwarding related functions.
- **Follow-Up** – the follow up tab allows you to add a follow-up task to the ticket.
- **Billing** – the billing tab calls up the billing information bar, allowing a staff user to add billing and time worked information to a ticket..
- **Add Notes** – the add notes tab enables the attaching of notes to the ticket.
- **Release** – the release tab allows a staff user to release a ticket to another (or no) staff user.
- **History** – the history tab calls up the ticket creator's ticket history.
- **Chats** – the chats tab calls up the ticket creator's chat history (not applicable to eSupport).
- **Audit Log** – the audit log tab calls up a detailed audit history of the ticket, such as status changes, replies, priority changes and department transfers.
- **Edit** – the edit tab calls up editable ticket fields such as recipients and ticket properties.

Mass-replying to tickets

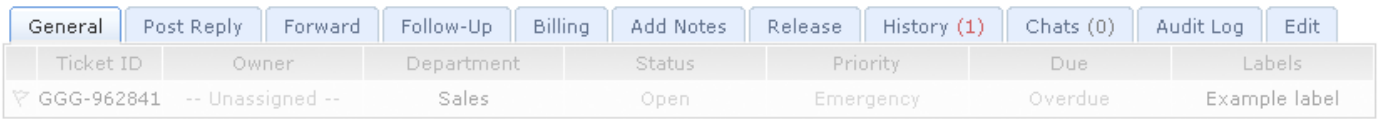
This can be done visa the mass-management interface within a ticket listing, as shown below.



For more information on the ticket reply interface, see replying to a single ticket.

Replying to a ticket

When viewing a ticket (as detailed in viewing a ticket), click on the **Post Reply** tab on the **ticket management menu** as shown below.



This will present you with the ticket reply interface, as shown below.

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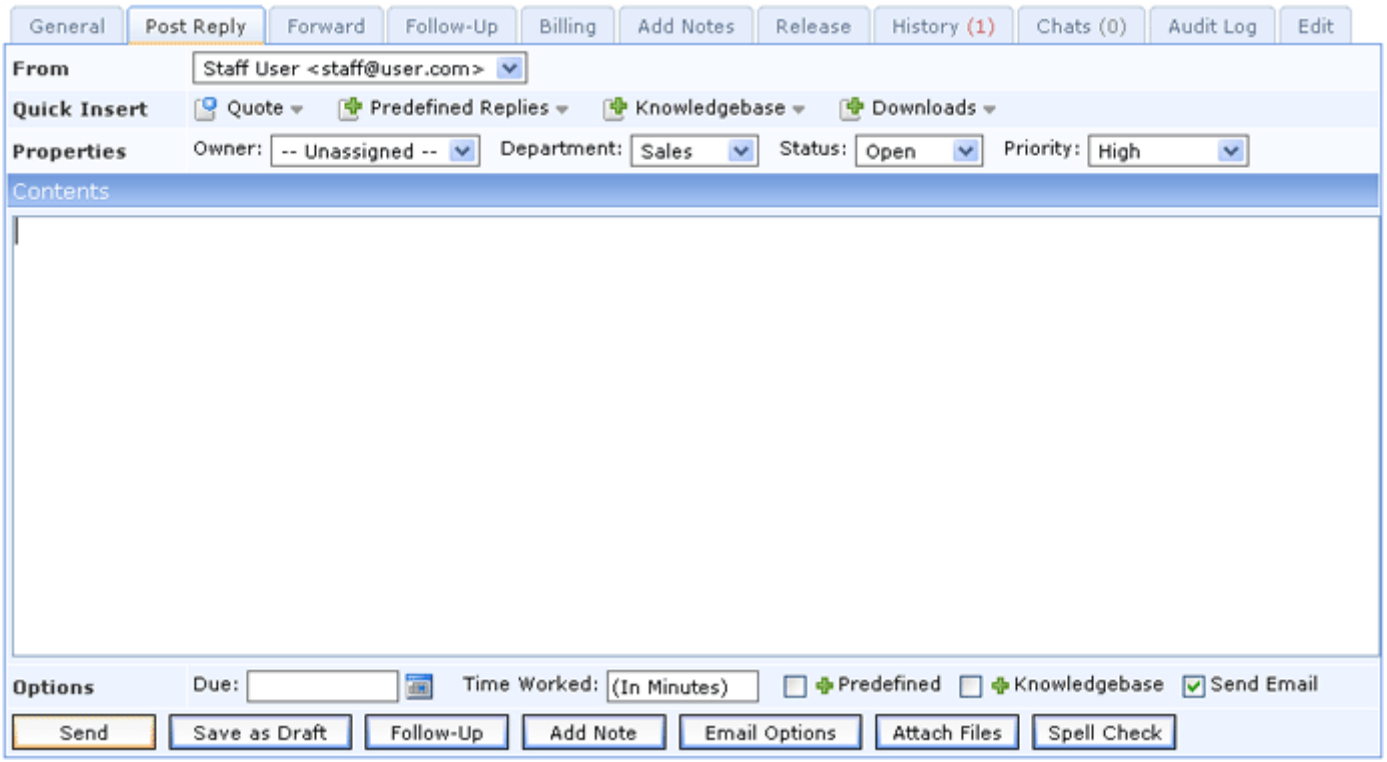

From

Quick Insert
- Quote
- Predefined Replies
- Knowledgebase
- Downloads

Properties
- Owner
- Department
- Status
- Priority

Options
- Due
- Time Worked
- Add to Predefined
- Add to Knowledgebase
- Send Email

Buttons
- Send – sends the reply.
- Save as Draft
- Follow-Up
- Add Note
- Email Options
- Attach Files
- Spell Check

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From

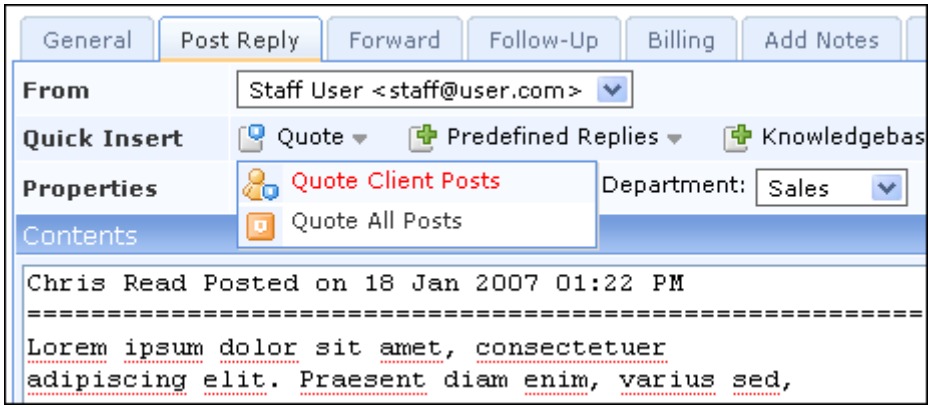
If there are multiple **e-mail queues** configured (in the **administrator control panel**) for SupportSuite, a different "From" address and name can be set here.

Quick-insert

Quote

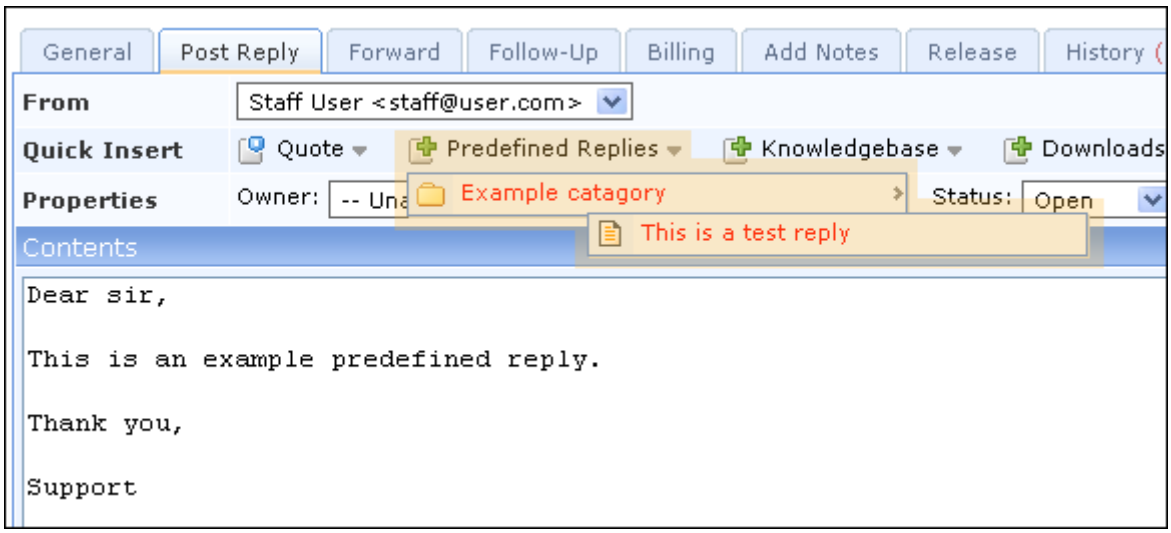
Past correspondence from within the ticket can be quoted using this menu.

Quote Client Posts – pastes all of the client's correspondence from within the ticket into the reply area.
Quote All Posts – pastes an entire correspondence copy of all replies within the ticket.



Predefined Replies

Introduces a menu of predefined reply categories, allowing you to navigate through the replies and paste a predefined reply into the reply area. For more information on predefined replies, see Predefined Replies.



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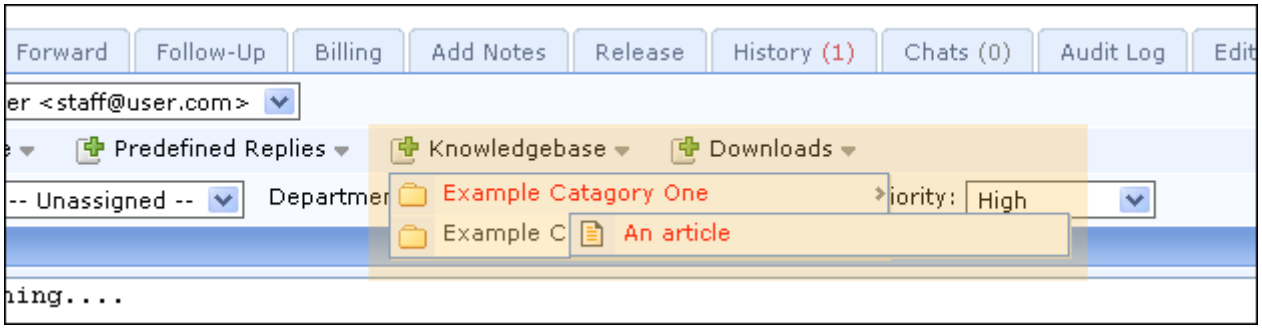
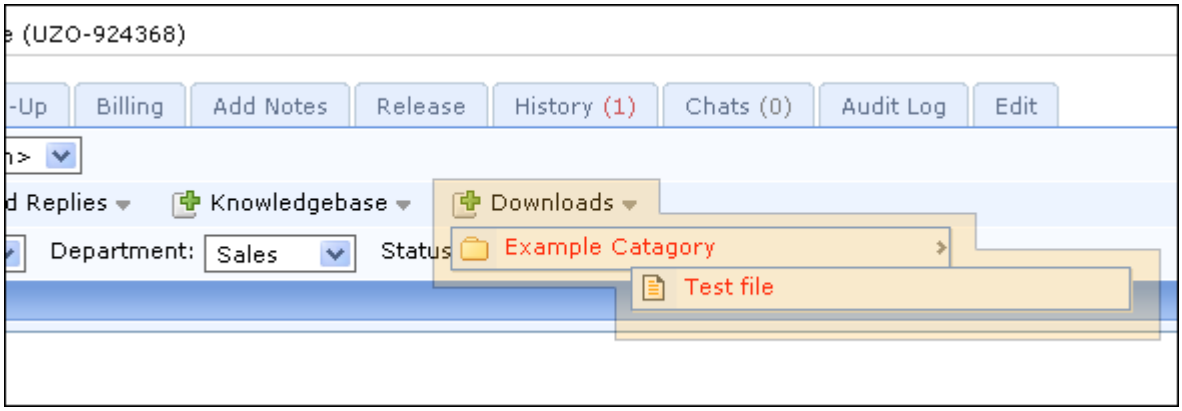
Knowledgebase

Working similarly to the predefined replies menu, opening this menu will introduce a list of knowledgebase categories and articles for pasting into the reply area.

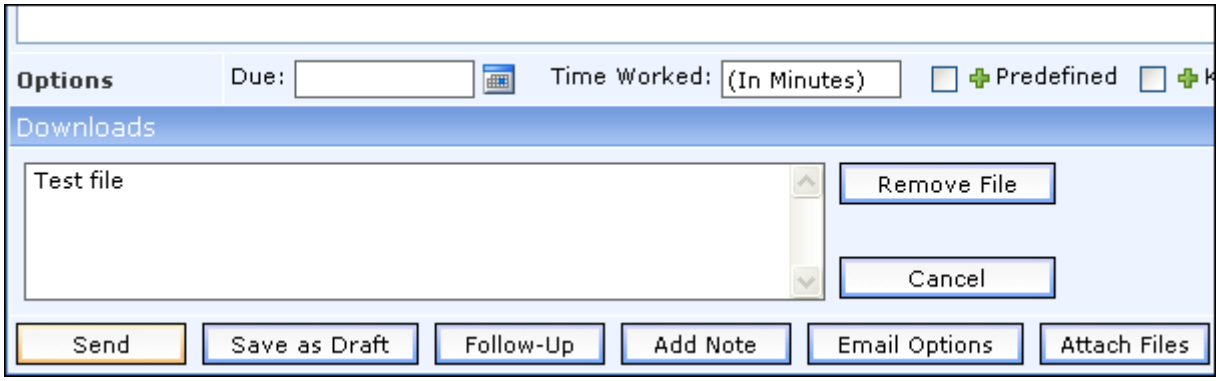


Downloads

Opening this menu will introduce a list of downloads categories and their respective files, allowing attachment of the files to the ticket reply, as shown below.



Attached downloads will appear underneath the reply area, as shown below.



Properties

Owner

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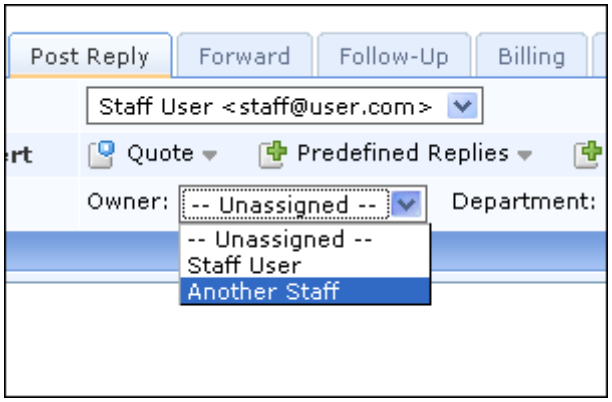
The owner of the ticket can be set here (ticket assignment). For more information on ticket assignments, see Ticket Assignments.

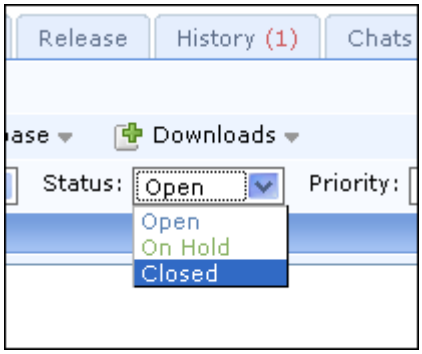


Department

The department in which the ticket resides can be changed using this menu.

Status

The status of the ticket can be changed using this menu. For more information on ticket statuses, see Ticket Status.



Priority

The priority of the ticket can be changed using this menu. For more information on ticket priorities, see Ticket Priority.

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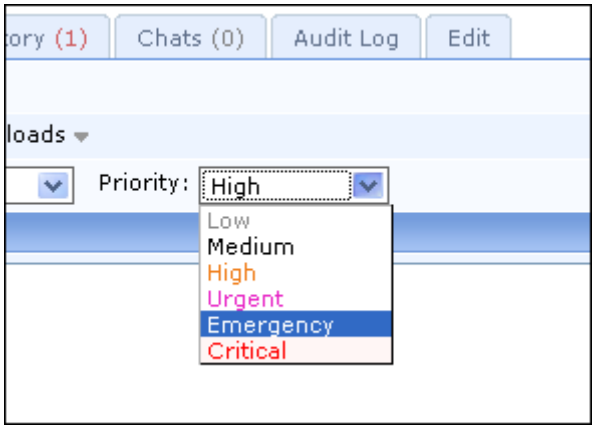
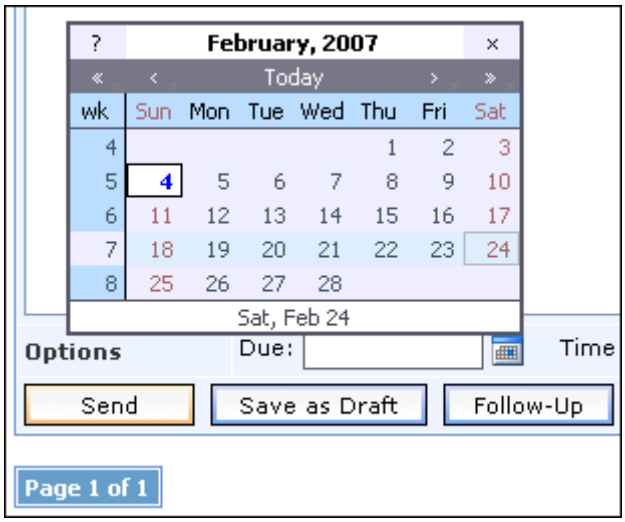


Options

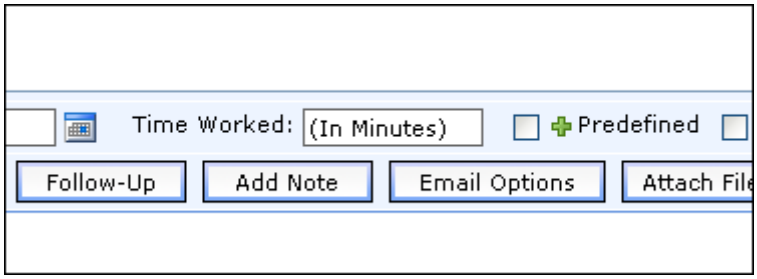
Due

As part of the ticket's reply, a due date can be set for the ticket. Clicking on the calendar icon (as shown below) will bring up a calendar. Clicking on a day will set the ticket due for that day. For more information on ticket due times, see Ticket Due Times.



Time worked

As part of the time tracking information features of SupportSuite, the time worked on the ticket reply can be entered here – adding to the total time worked on the ticket. For more information on time tracking and billing information, see Billing Information.



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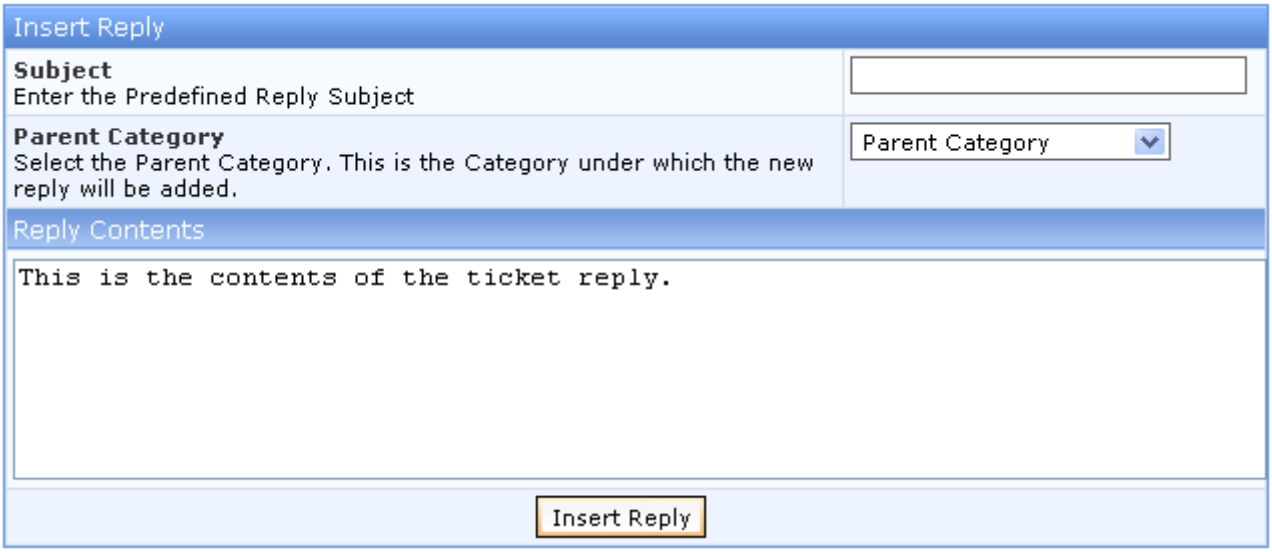
Add to predefined

Checking this box will allow for the creation of a new **predefined reply** based on the contents of the ticket reply entered. After sending the ticket reply, you will be presented with a predefined reply entry form, as shown below. For more information on predefined replies, see Predefined Replies.


Insert Reply
Subject
Enter the Predefined Reply Subject
Parent Category
Select the Parent Category. This is the Category under which the new reply will be added.
Parent Category
Reply Contents
This is the contents of the ticket reply.
Insert Reply

Add to knowledgebase

Checking this box will allow for the creation of a new **knowledgebase article** based on the contents of the ticket reply entered. After sending the ticket reply, you will be presented with a knowledgebase article entry form, as shown below.

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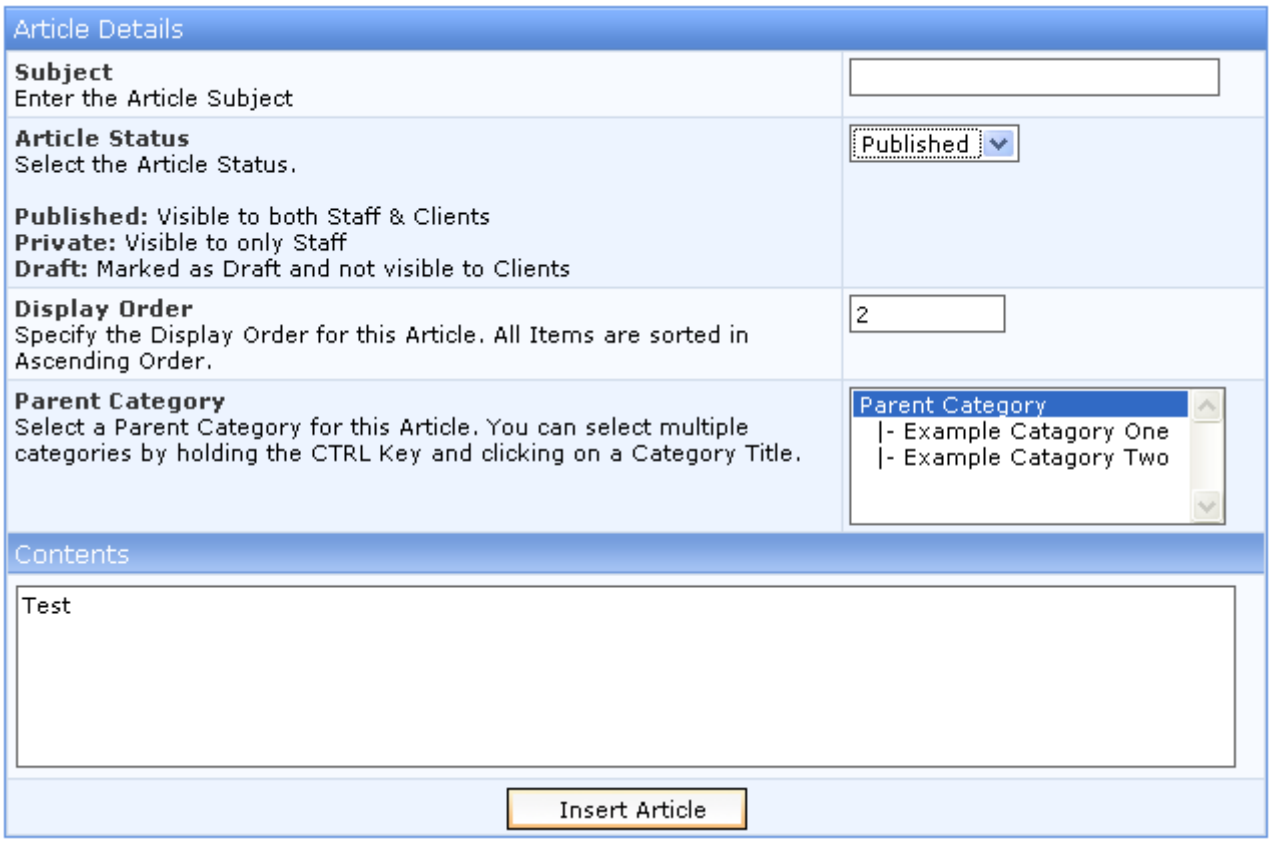

Article Details
Subject
Enter the Article Subject
Article Status
Select the Article Status.
Published: Visible to both Staff & Clients
Private: Visible to only Staff
Draft: Marked as Draft and not visible to Clients
Published
Display Order
Specify the Display Order for this Article. All Items are sorted in Ascending Order.
2
Parent Category
Select a Parent Category for this Article. You can select multiple categories by holding the CTRL Key and clicking on a Category Title.
Parent Category
|- Example Catagory One
|- Example Catagory Two
Contents
Test
Insert Article

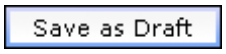
Send e-mail

Checking this box will send the ticket reply by e-mail to the client. With this box checked, the ticket reply will still be recorded and available to the client via the **client support interface**, but a copy will not be sent by e-mail.

Buttons

Save as draft

Clicking on this button will save the contents of the ticket reply area. When you next open the reply interface for this ticket, the draft contents will appear in the ticket reply area, available for modification.



Follow-up

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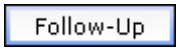
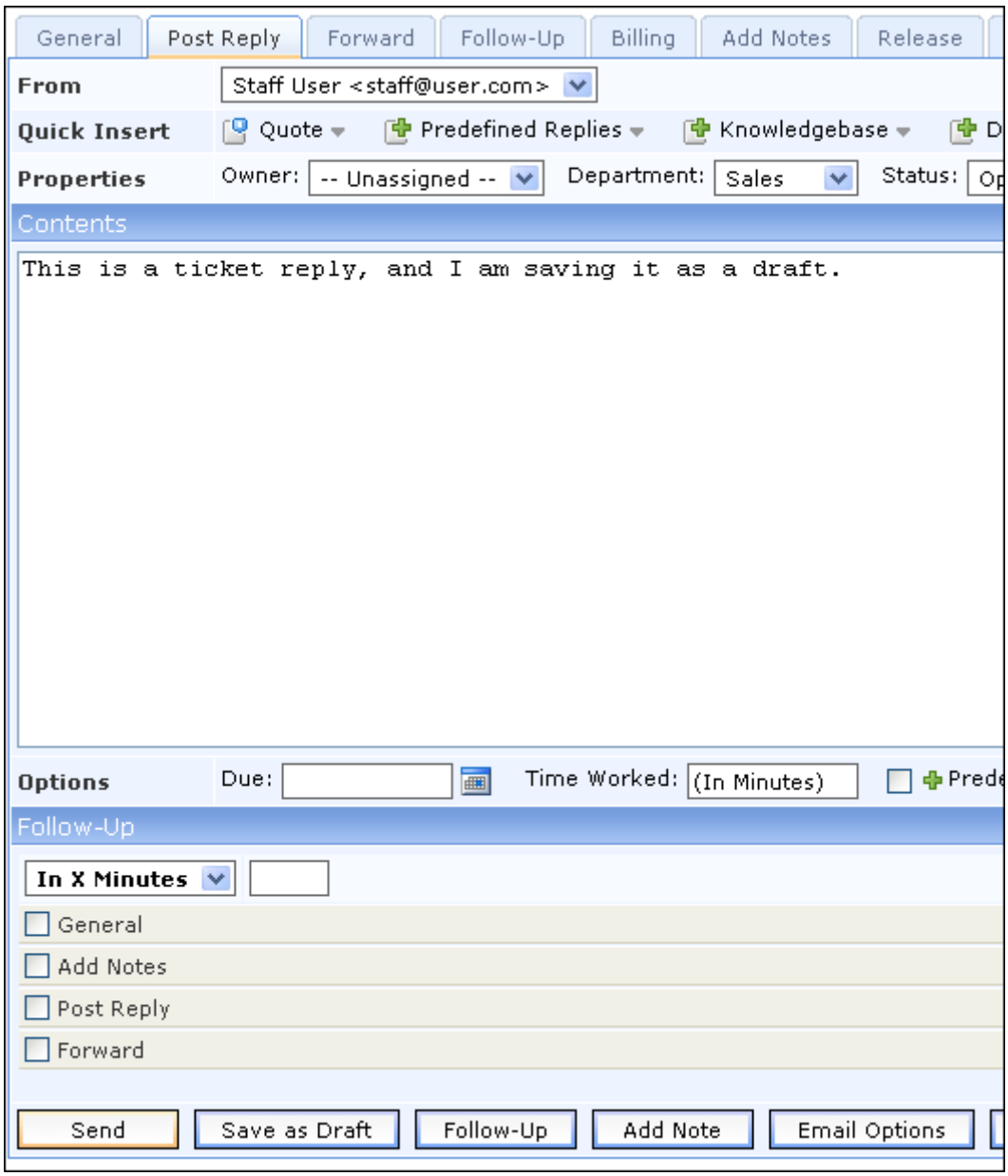
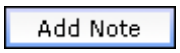
Clicking on this button will open up **ticket follow-up** options that can be set for the ticket when a reply has been sent, as shown below. Clicking on this button again will hide the follow-up options. For more information on ticket follow-up, see Ticket Follow-up.





Add note

Clicking on this button will introduce a **ticket note** field (as shown below), allowing the entry of a ticket note that will be attached to the ticket once the reply has been sent. Clicking on this button again will hide the ticket note field.



Selecting **Ticket** will append the note to the ticket. Selecting **User** will append the note to the user account of the ticket creator. For both of these options, the ticket will not be visible to the client.

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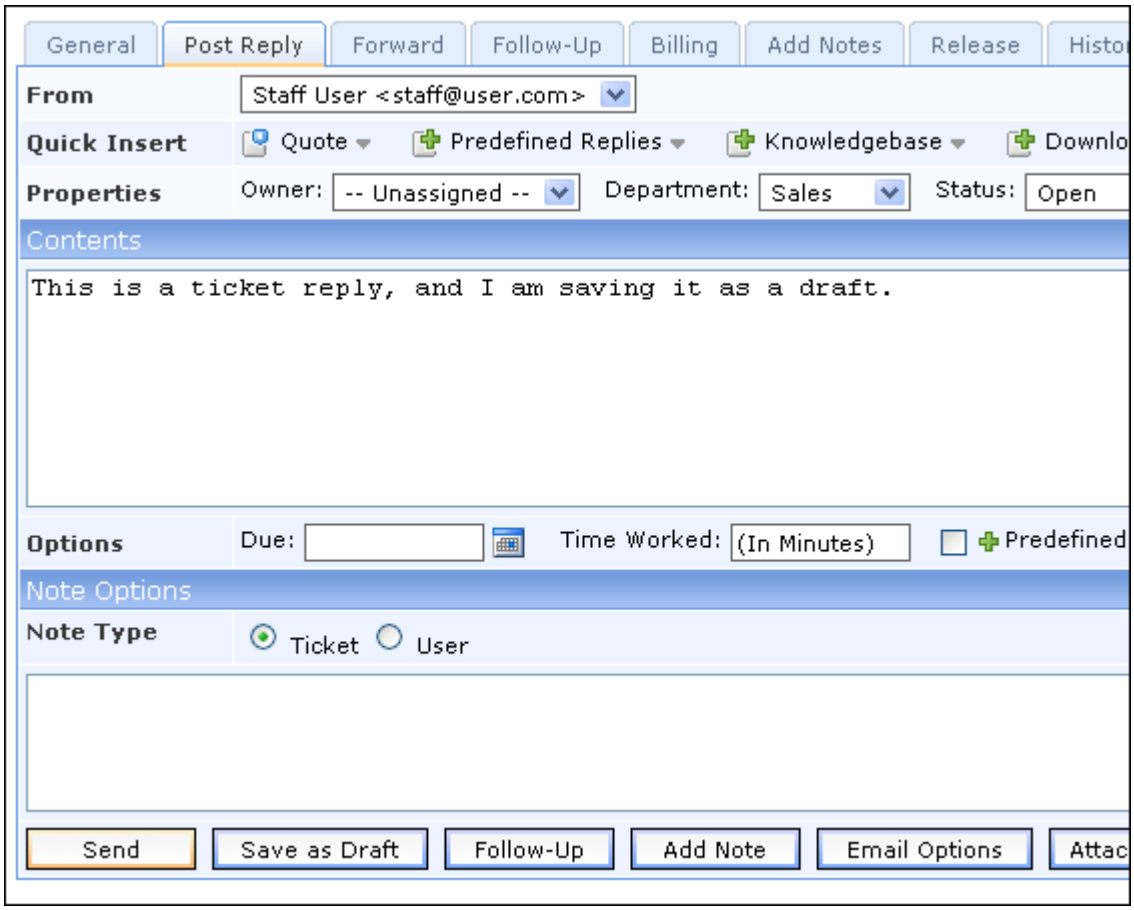
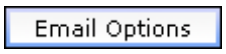


For more information on ticket notes, see Ticket Notes.

E-mail options

Clicking on the **e-mail options** button will introduce fields allowing for the addition of a **Carbon Copy (CC)** and a **Blind-carbon Copy (BC)** e-mail addresses. When the **Send E-mail** button is checked (see Send E-mail), the ticket reply will also go out to the addresses entered here.



Checking the **Add to Recipients** box will add the address(s) to the recipients list for the ticket, meaning that any reply subsequent to this will be sent out to the addresses.

For more detailed information on CC, BCC and third party recipients see CC, BCC and third party recipients.

Checking this box also means that replies can be made and appended to this ticket from the added addresses.

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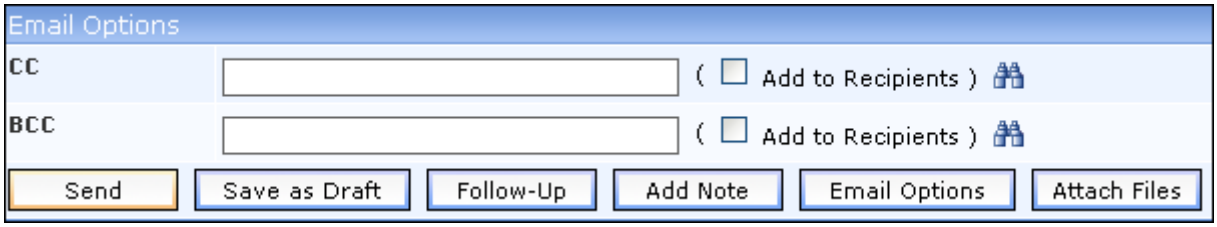
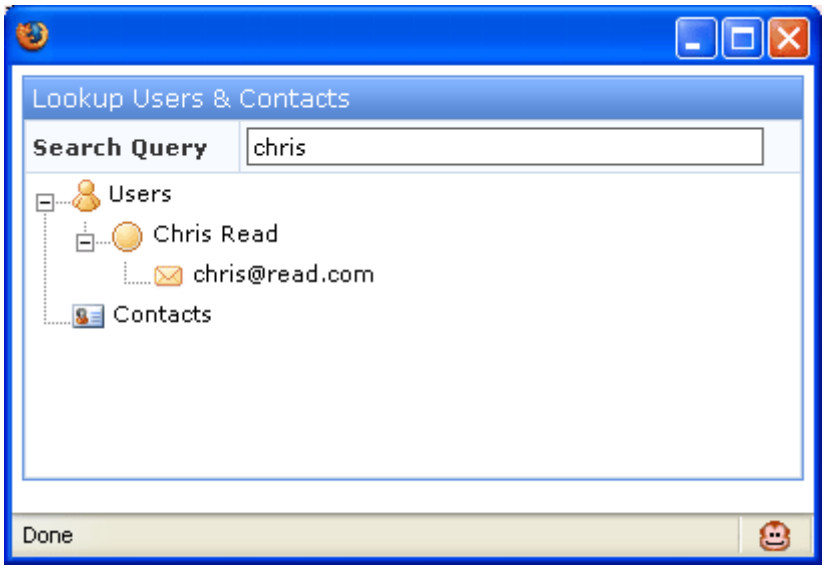
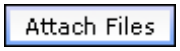


Clicking on the binoculars icon will open an **address search** window, allowing the search of e-mail addresses from user accounts and the contacts list, as shown below. The search is performed **as you type**.



Attach files

Clicking on the **attach files** button will introduce the **file attachments** fields, allowing the upload of files from the staff user's computer. If attachment of files that already exist within the **downloads** area is required, see Downloads on the quick-insert menu.



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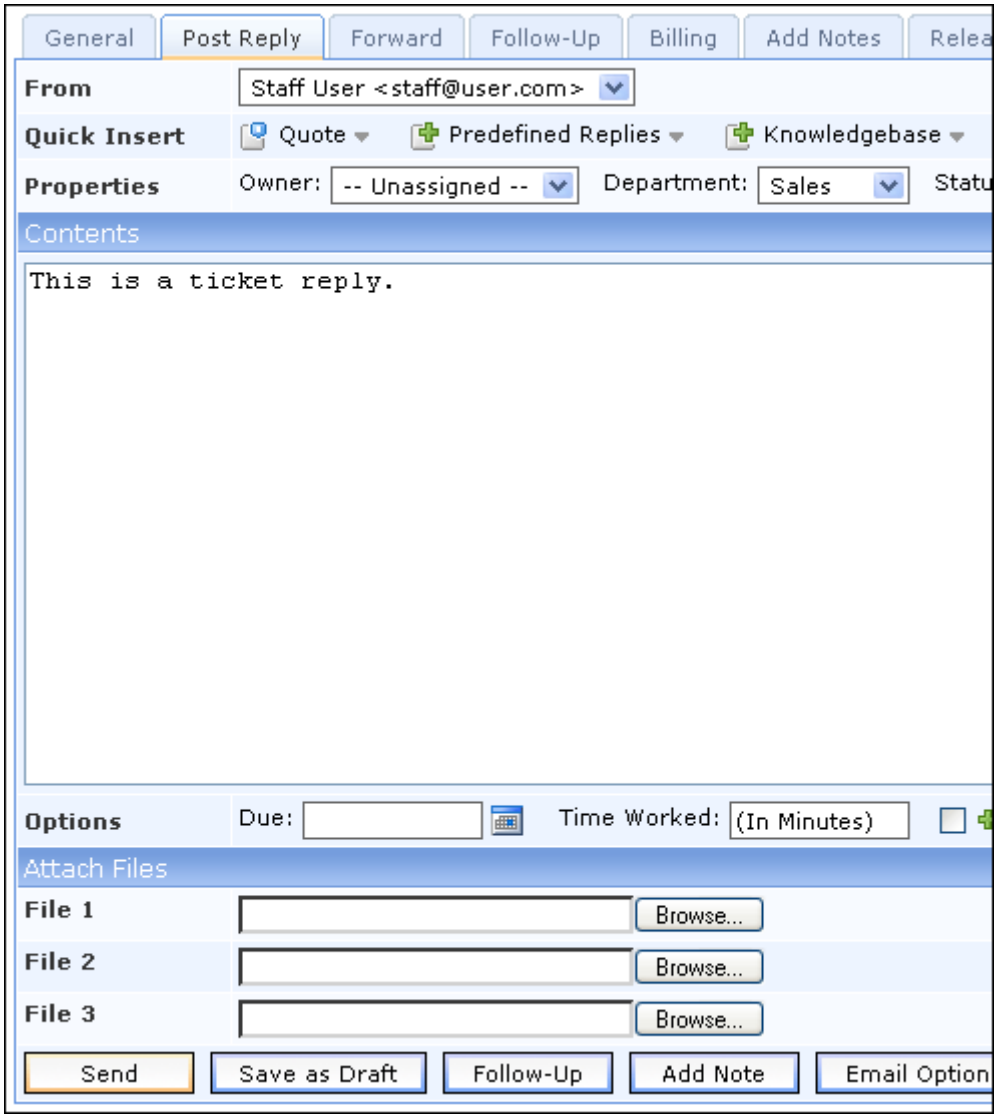

Clicking on the **browse** button for each corresponding file location field will open a file browser, as shown below. Use this to select the file for upload and attachment.

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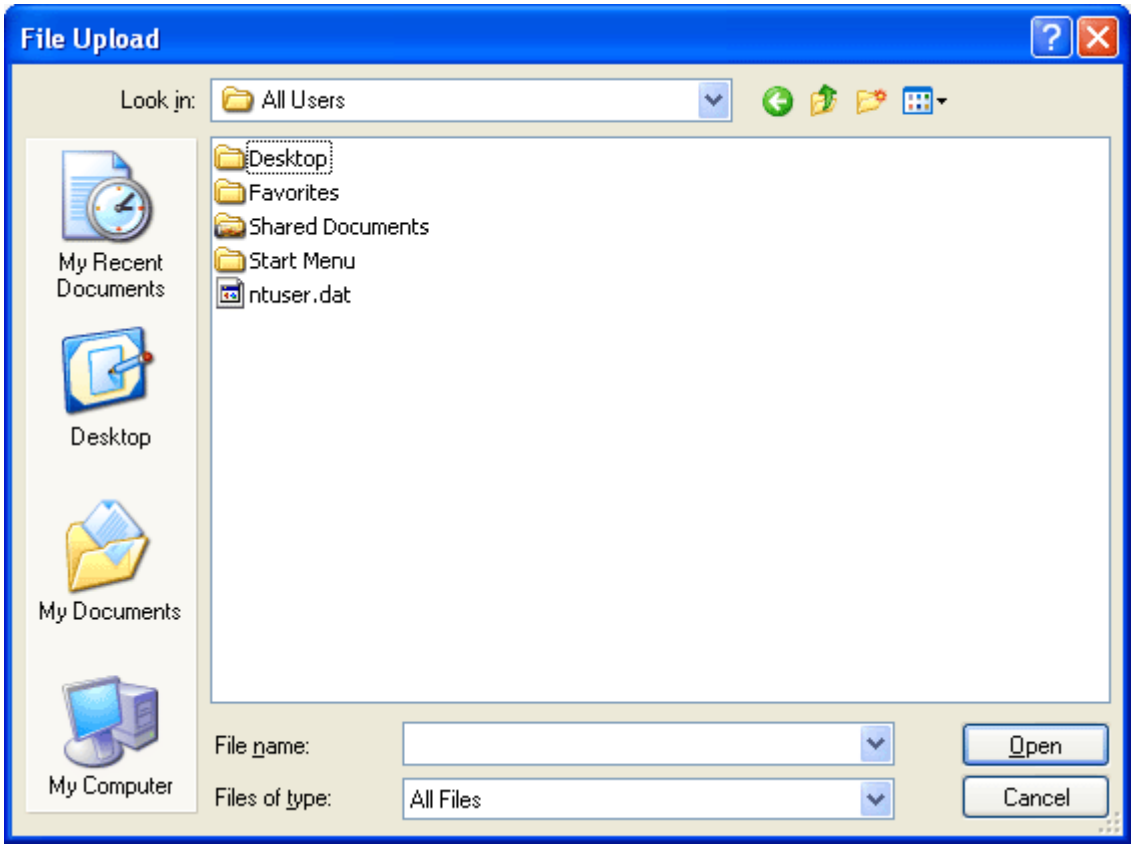
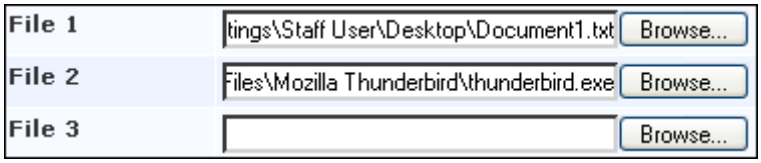


After selecting a file, the absolute path of the file will be entered in the corresponding file field box, as shown below. Up to two more files can be attached in this way.



The maximum number of files that can be attached to a ticket reply is defined in the administrator control panel (see ticket settings in the administrator control panel).

Sending the ticket reply (after clicking on the **Send** button) may take longer than usual depending on the sizes of the files being attached to the ticket reply.

If being sent out as an e-mail (see the Send E-mail option), the files will be attached to the outgoing e-mail. They will also be available from within the **client support interface**.

The attached file will also be available through the staff's view of the reply, as shown below.

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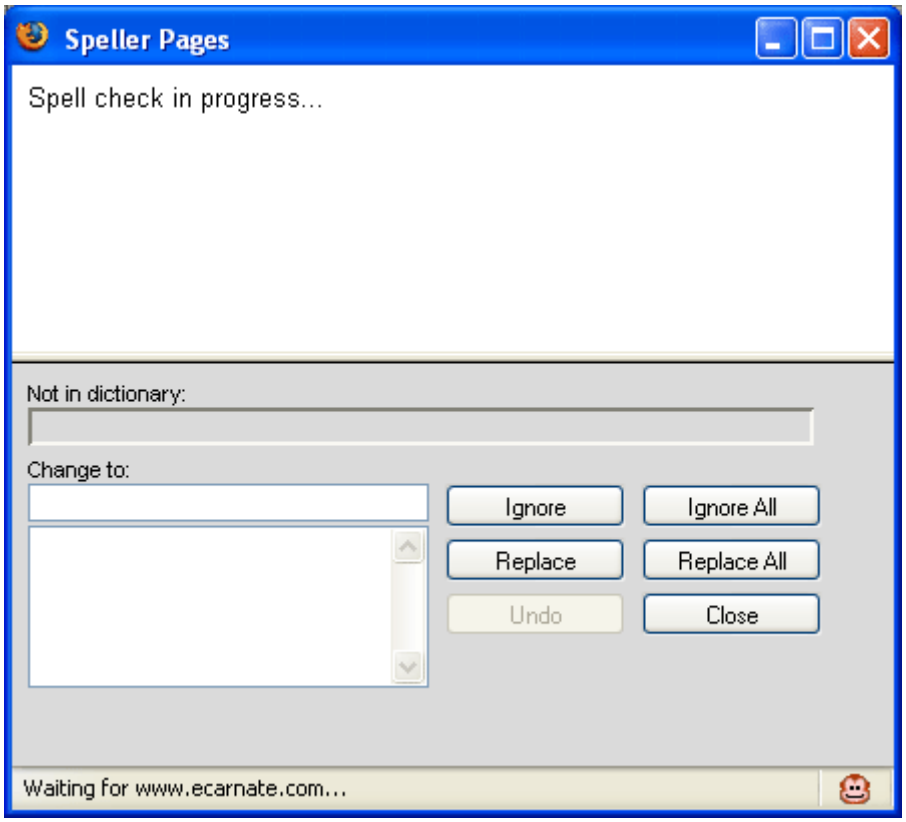
Spell check

Clicking on the **spell check** button will open up the **spell checker** that will start performing a spell check, as shown below.



After spell checking is complete, you will be taken through each unrecognized word with the options to **Ignore** the spelling mistake or **Replace** the spelling mistake with a suggestion, and so on.

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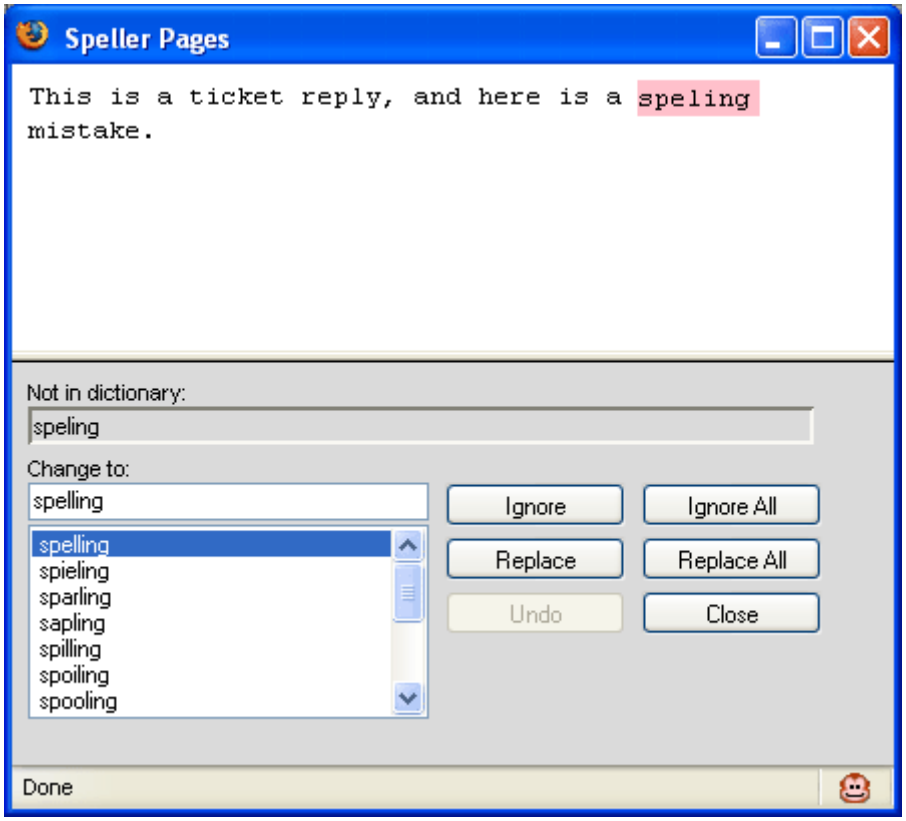
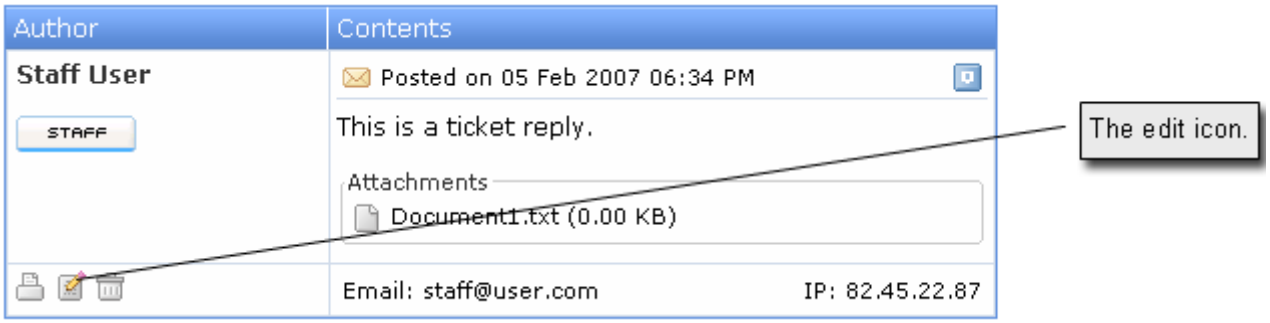


Any changes done using the spell checker will be automatically amended to your ticket reply area after clicking on the **Close** button.

Editing a ticket

Editing a ticket reply's post content

The contents of a ticket reply can be edited via the ticket body view by clicking on the edit icon, as shown below.



Clicking on this icon will open an editable window that allows editing of the reply's contents, as shown below.

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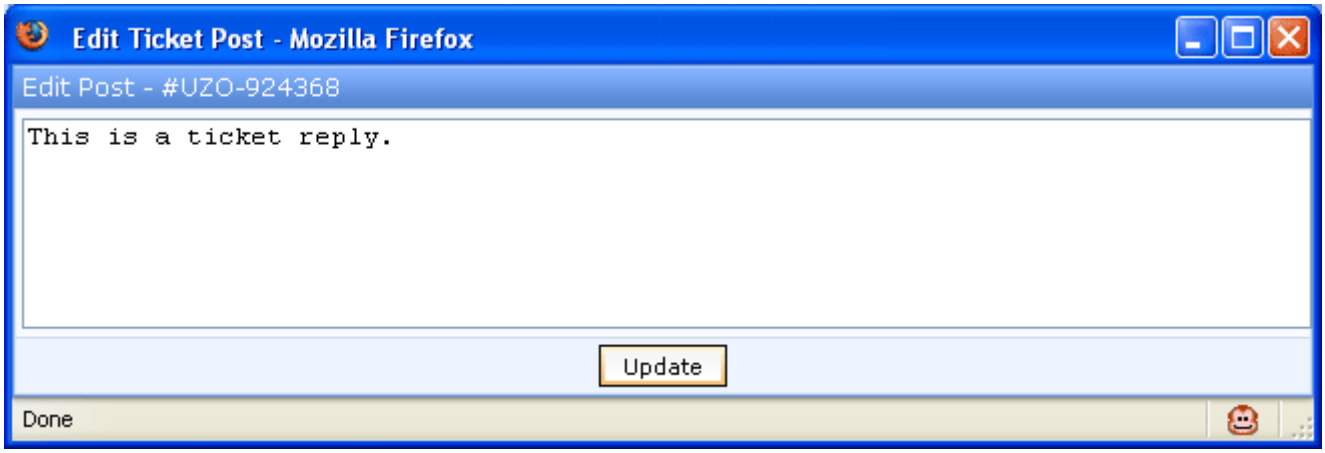
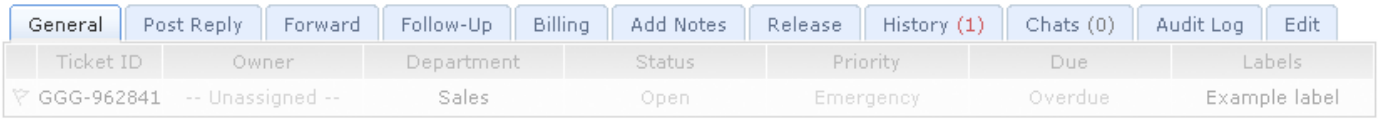


Following submission of the changes, an **edited by** note will be appended to the bottom of the ticket reply, as shown below.

Editing ticket options

A ticket's options can be edited using the **ticket management menu**, as shown below.



Click on the **Edit** tab to open a list of editable ticket fields, as shown below.

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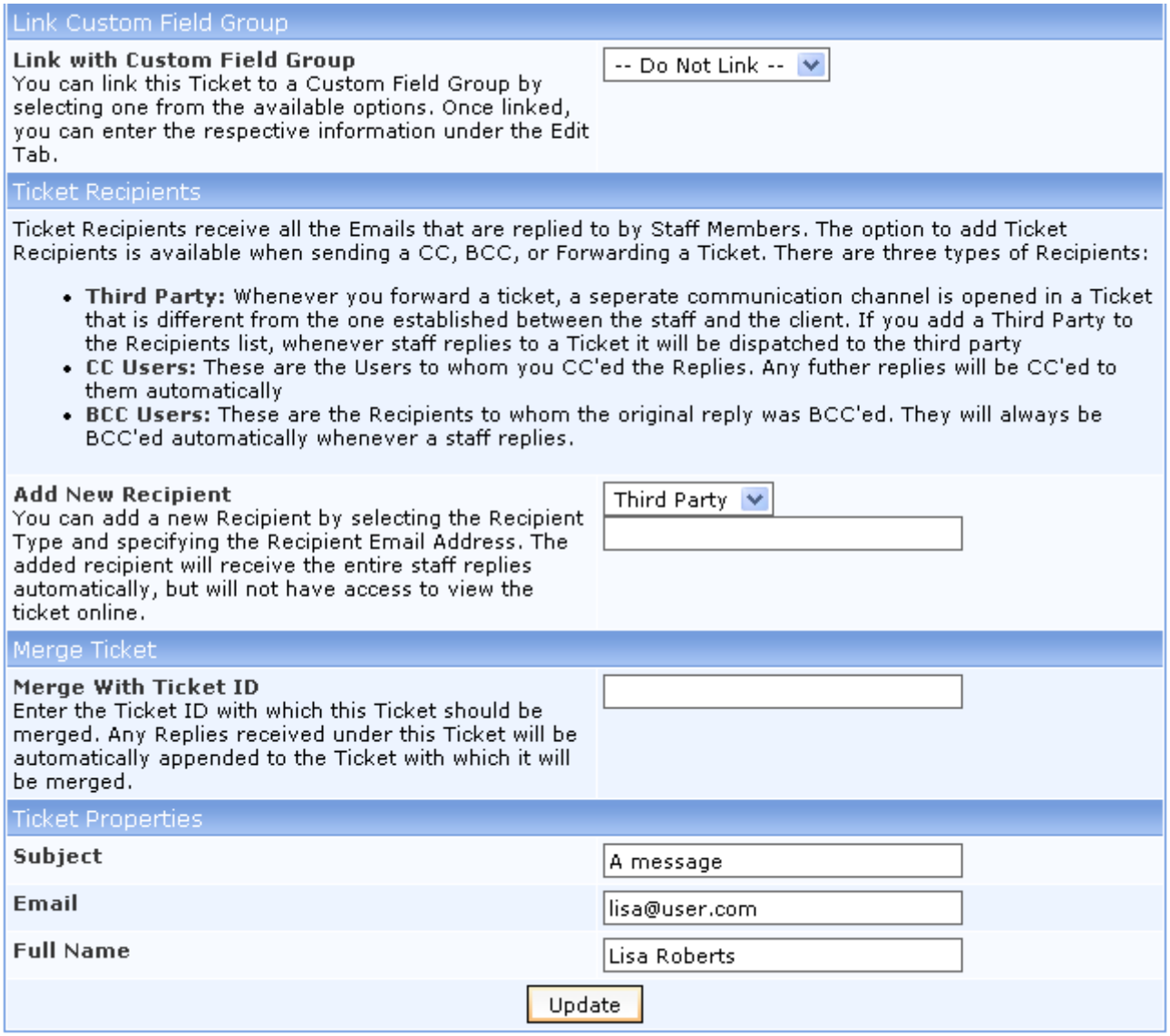
Link Custom Field Group
Link with Custom Field Group
You can link this Ticket to a Custom Field Group by selecting one from the available options. Once linked, you can enter the respective information under the Edit Tab.
-- Do Not Link --
Ticket Recipients
Ticket Recipients receive all the Emails that are replied to by Staff Members. The option to add Ticket Recipients is available when sending a CC, BCC, or Forwarding a Ticket. There are three types of Recipients:
Third Party: Whenever you forward a ticket, a seperate communication channel is opened in a Ticket that is different from the one established between the staff and the client. If you add a Third Party to the Recipients list, whenever staff replies to a Ticket it will be dispatched to the third party
CC Users: These are the Users to whom you CC'ed the Replies. Any futher replies will be CC'ed to them automatically
BCC Users: These are the Recipients to whom the original reply was BCC'ed. They will always be BCC'ed automatically whenever a staff replies.
Add New Recipient
You can add a new Recipient by selecting the Recipient Type and specifying the Recipient Email Address. The added recipient will receive the entire staff replies automatically, but will not have access to view the ticket online.
Third Party
Merge Ticket
Merge With Ticket ID
Enter the Ticket ID with which this Ticket should be merged. Any Replies received under this Ticket will be automatically appended to the Ticket with which it will be merged.
Ticket Properties
Subject
A message
Email
lisa@user.com
Full Name
Lisa Roberts
Update

Link Custom Field Group

Custom field groups are managed within the administrator control panel. A ticket can be linked to a set of custom fields. Once linked, custom fields can be edited for this ticket by returning to the Edit tab (shown above).

Ticket Recipients

For more detailed information on CC, BCC and third party recipients see CC, BCC and third party recipients.

Merge Ticket

Merge With Ticket ID – to merge the current ticket to another ticket, enter the ID of the second ticket here. The ticket replies will all be merged chronologically, and the current ticket will be deleted. The ticket creator's address of the current ticket will be added as a CC user to the new, merged ticket.

Ticket Properties

Subject – the subject of the ticket.

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Email – the e-mail address of the ticket creator (primary recipient).

Full Name – full name of the ticket creator.

Creating a ticket

Tickets can be created by staff users in the form of an **e-mail ticket** (which can also be considered as sending or starting an e-mail to a user) or a **phone ticket** (for example, if a phone call is taken and needs to be logged as a ticket).

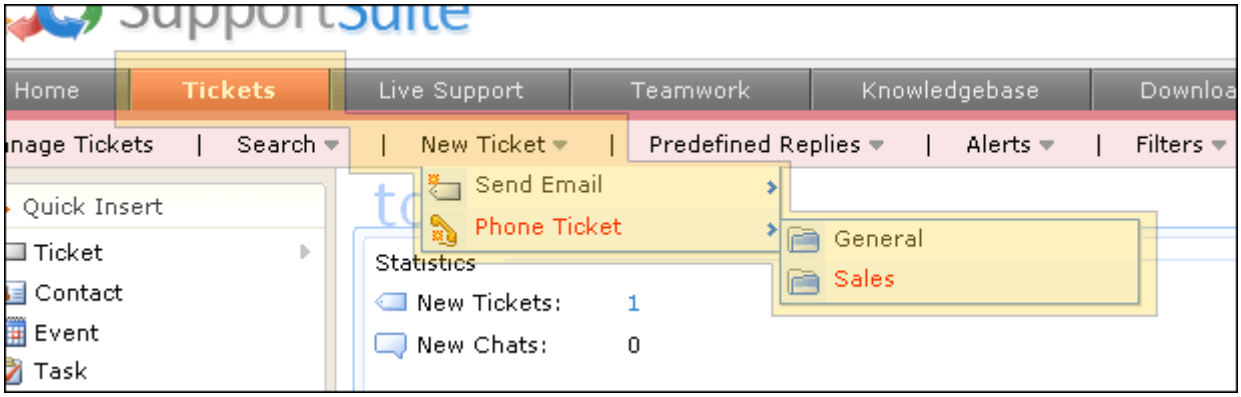
E-mail ticket (sending an e-mail)

A staff user can create an **e-mail ticket** from within the **staff control panel**. "Creating a ticket" can also be referred to as sending an e-mail to a user.

A ticket can be created via the **quick-insert menu** and the **navigation menu**.

Via the navigation menu:

1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **New Ticket** sub-menu.
3. Hover over the **Send Email** menu.
4. Click on the **department** in which you wish to create the ticket.

Via the quick-insert menu:

1. Open **Tickets** on the quick-insert menu, as shown below.

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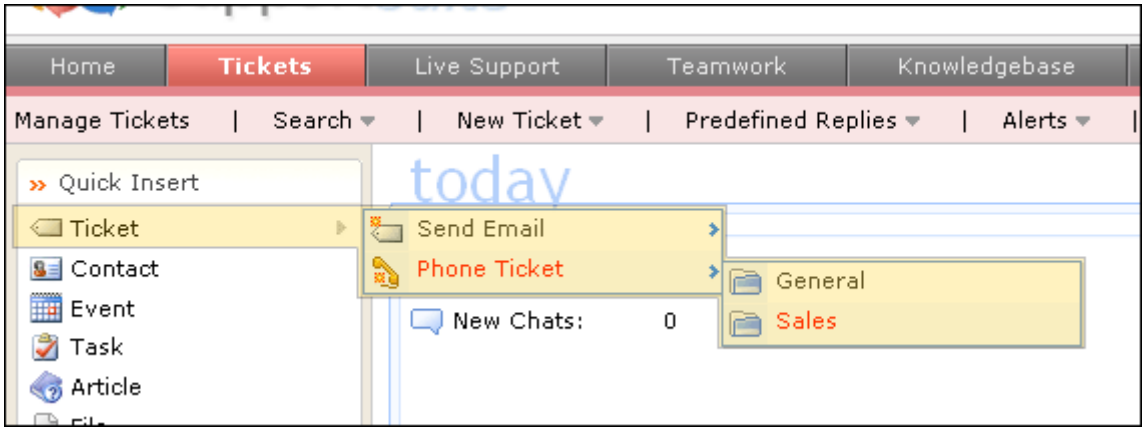
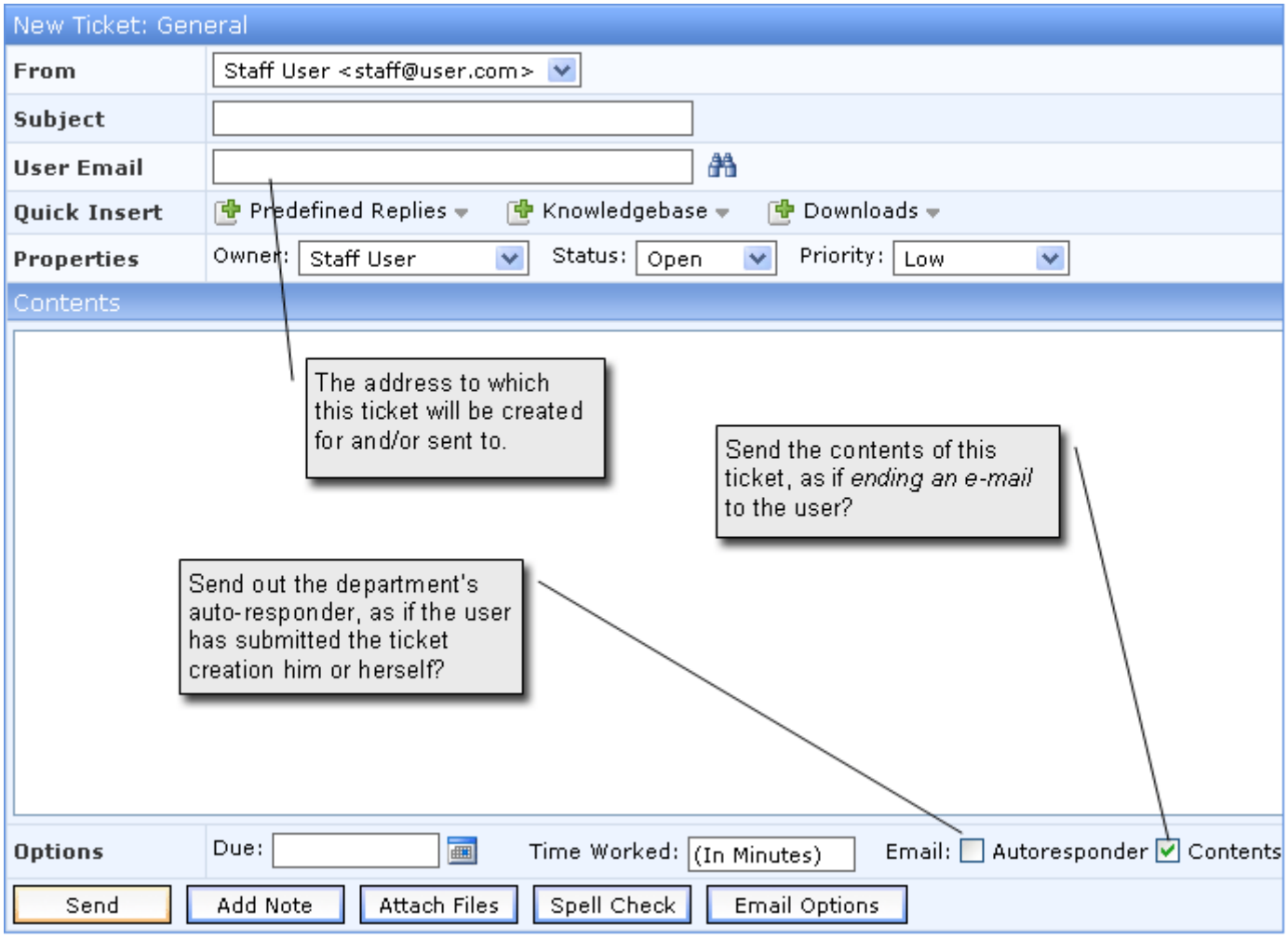


2. Open the **New Ticket** sub-menu.
3. Hover over the **Send Email** menu.
4. Click on the **department** in which you wish to create the ticket.

The create ticket interface will then be introduced, as shown below.



Other than the fields detailed above, the **create ticket interface** is much the same as the standard **ticket reply interface**, which is documented in replying to a single ticket. Some ticket reply options

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are not available in the **create ticket interface**, as they relate specifically to a ticket that already exists.

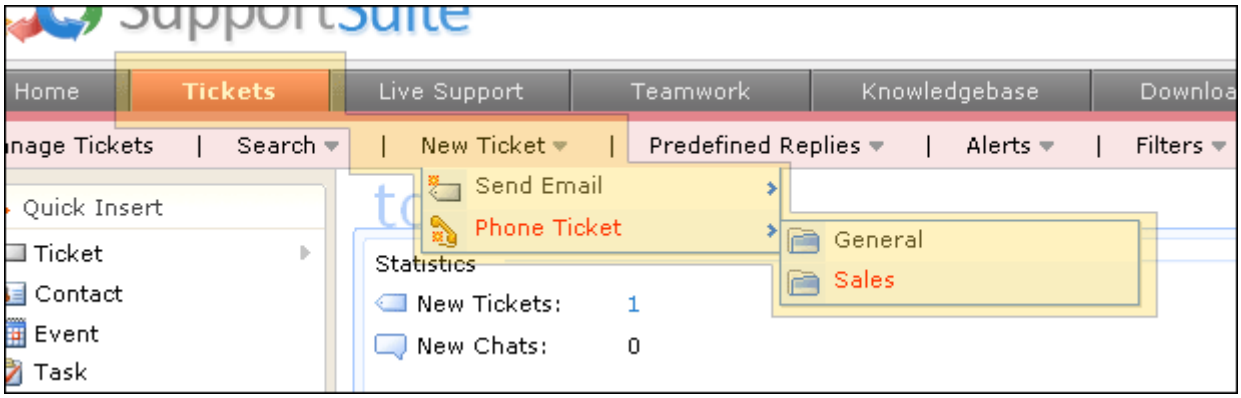
Phone ticket

A staff user can create a **phone ticket** from within the **staff control panel**.

A ticket can be created via the **quick-insert menu** and the **navigation menu**.

Via the navigation menu:

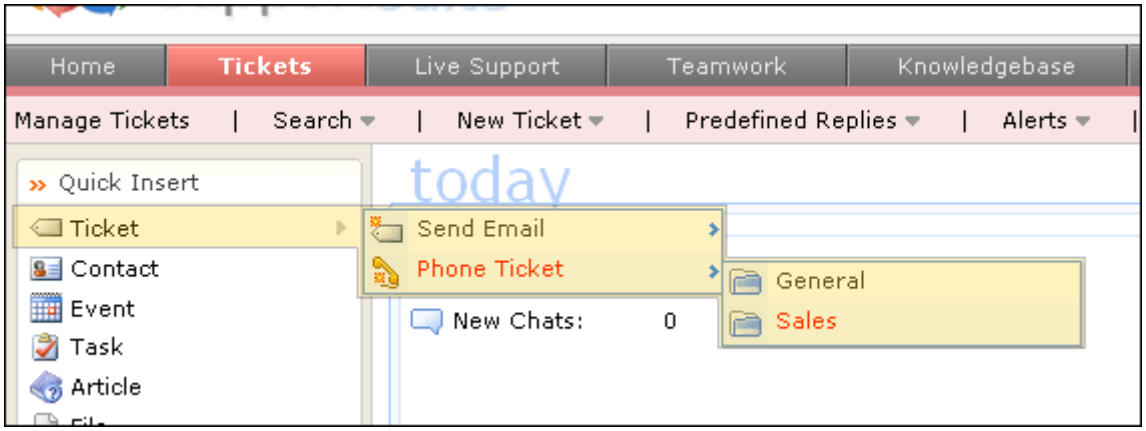
1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **New Ticket** sub-menu.
3. Hover over the **Phone Ticket** menu.
4. Click on the **department** in which you wish to create the ticket.

Via the quick-insert menu:

1. Open **Tickets** on the quick-insert menu, as shown below.



2. Open the **New Ticket** sub-menu.

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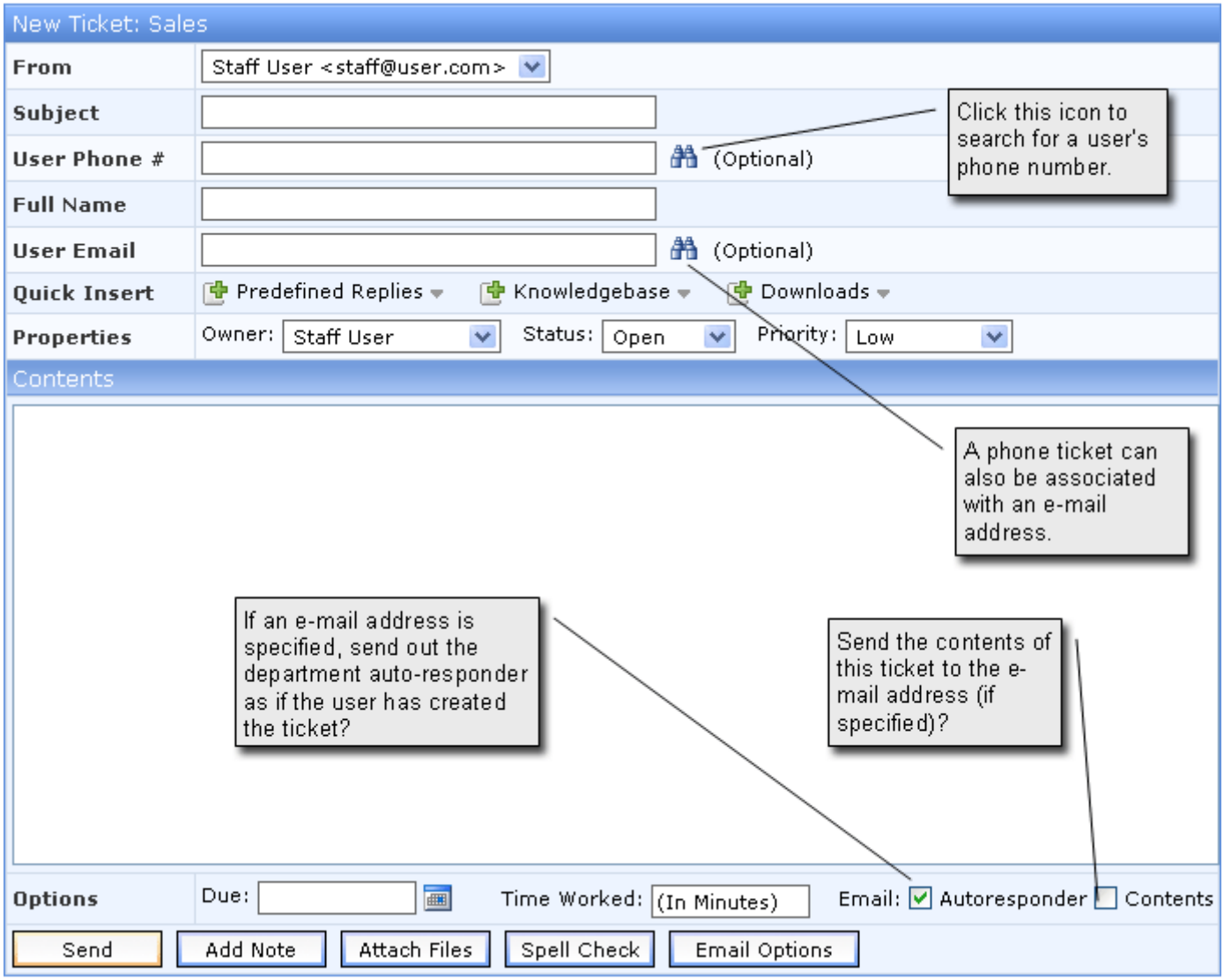
3. Hover over the **Phone Ticket** menu.
4. Click on the **department** in which you wish to create the ticket.

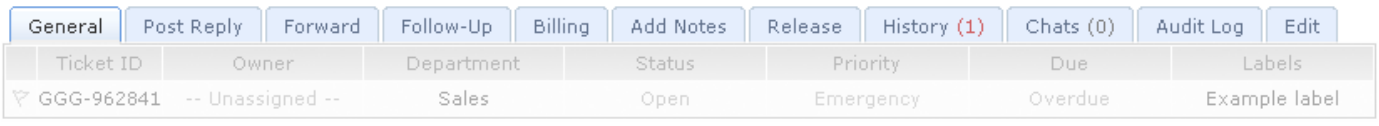
The create ticket interface will then be introduced, as shown below.



Other than the fields detailed above, the **create ticket interface** is much the same as the standard **ticket reply interface**, which is documented in replying to a single ticket. Some reply ticket options are not available in the **create ticket interface**, as they relate specifically to a ticket that already exists.

Forwarding a ticket

A ticket can be forwarded using the **ticket management menu**, as shown below.



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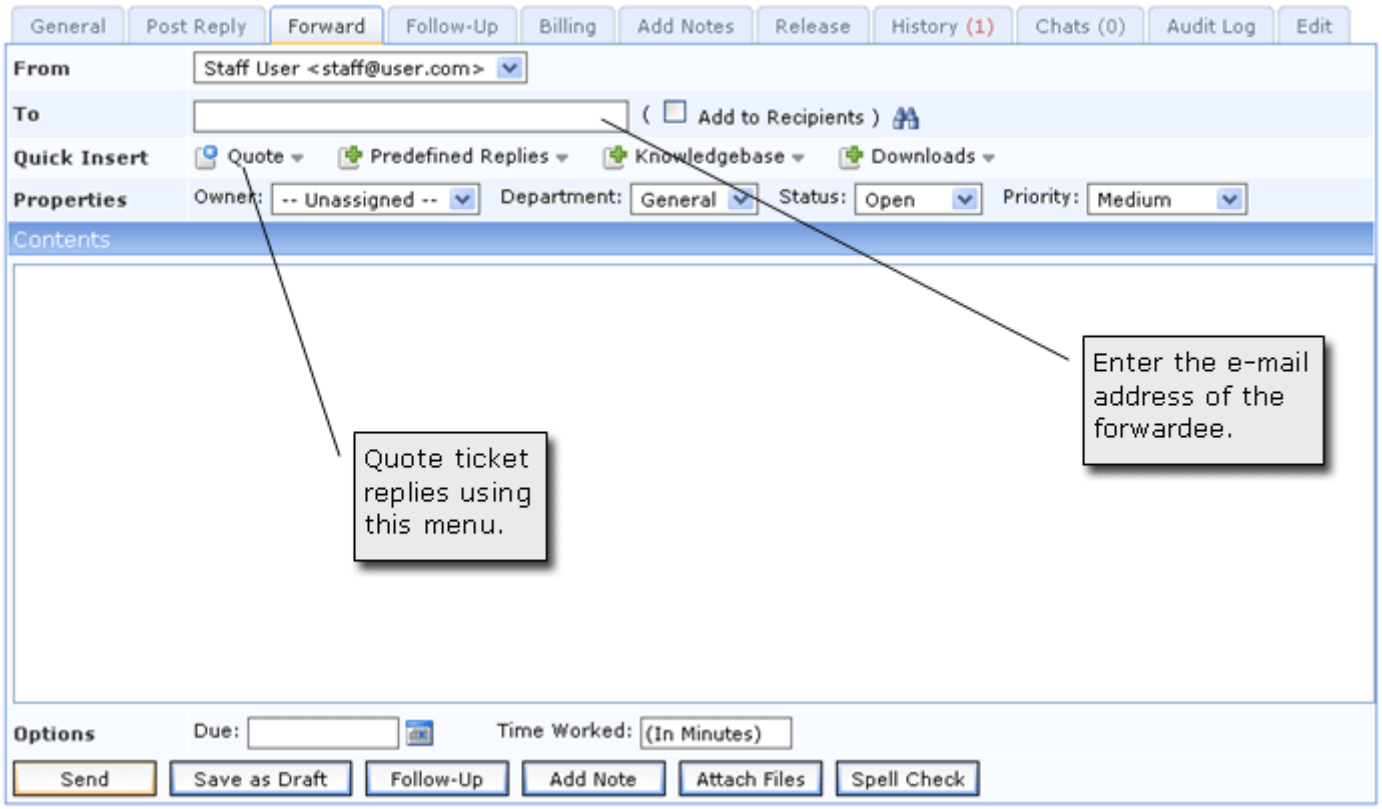
Click on the **Forward** tab to open the ticket forward interface, as shown below.



Forwarding a ticket is very much the same as creating a new ticket (sending an e-mail), with the exception that under **Quick Insert** you are able to quote ticket posts from the ticket history.

Forwarding a ticket to the recipient defined (as shown above) opens a separate communication channel what that user (as in, a completely new ticket).

However, if you click on the **Add to Recipients** box (as shown above), the forwardee will be added as a third party recipient (for more information on third party recipients, see CC, BCC and third party recipients). In this case, the third party can make ticket replies to the "current" ticket, rather than have them added to a separate ticket.

CC, BCC and third party recipients

STAFF THIRD PARTY USER RECIPIENT

CC User – a CC user who has been added to a ticket is carbon copied all replies sent by a staff user.

BCC User – a BCC user who has been added to a ticket is blind-carbon copied all replies sent by a staff user.

Third Party / Recipient – a third party recipient added to a ticket is carbon copied all replies sent by a staff user. A third party is able to send e-mail replies and have them appended to the ticket that was not originally created by them.

Note that adding an e-mail address as a recipient does not give a user behind this e-mail address access to the **client support interface**.

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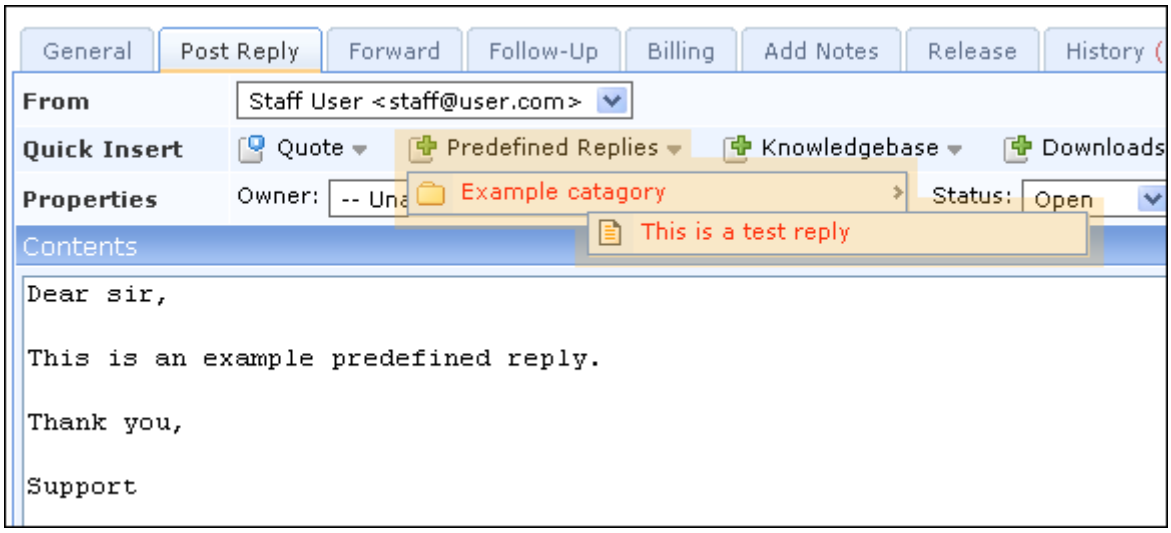
Whether or not a user gets to see third party recipient replies in the client support interface is configured in the administrator control panel (see ticket settings in the administrator control panel).

Predefined replies

A **predefined reply** is more commonly known as a **standard reply** – a ticket reply that has already been typed up and saved for re-use, either as a reply or as a template for a reply.

Using predefined replies

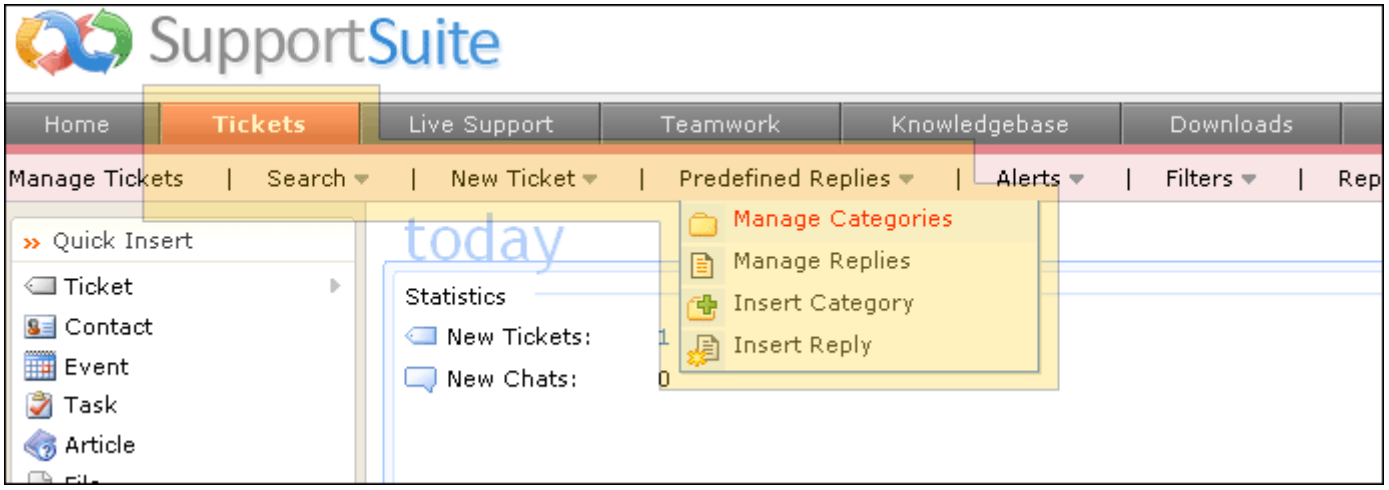
When replying to or creating a ticket, a **predefined reply** can be sourced and inserted using the **quick-insert** menus, as shown below.



Managing predefined reply categories

To view and manage predefined reply categories:

1. Open **Tickets** on the navigation menu, as shown below.



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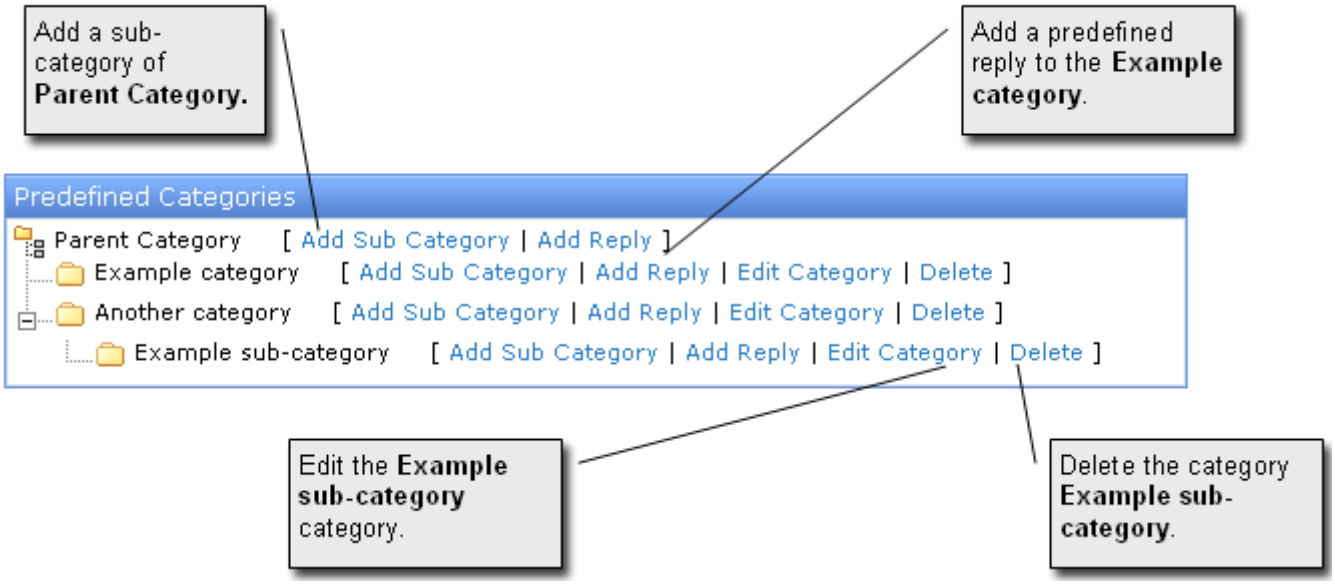
2. Open the **Predefined Replies** sub-menu.
3. Click on **Manage Categories**.

A list of all predefined reply categories will be presented, as shown below.


Add a sub-category of **Parent Category.**
Add a predefined reply to the **Example category**.
Predefined Categories
Parent Category [Add Sub Category | Add Reply]
Example category [Add Sub Category | Add Reply | Edit Category | Delete]
Another category [Add Sub Category | Add Reply | Edit Category | Delete]
Example sub-category [Add Sub Category | Add Reply | Edit Category | Delete]
Edit the **Example sub-category** category.
Delete the category **Example sub-category**.

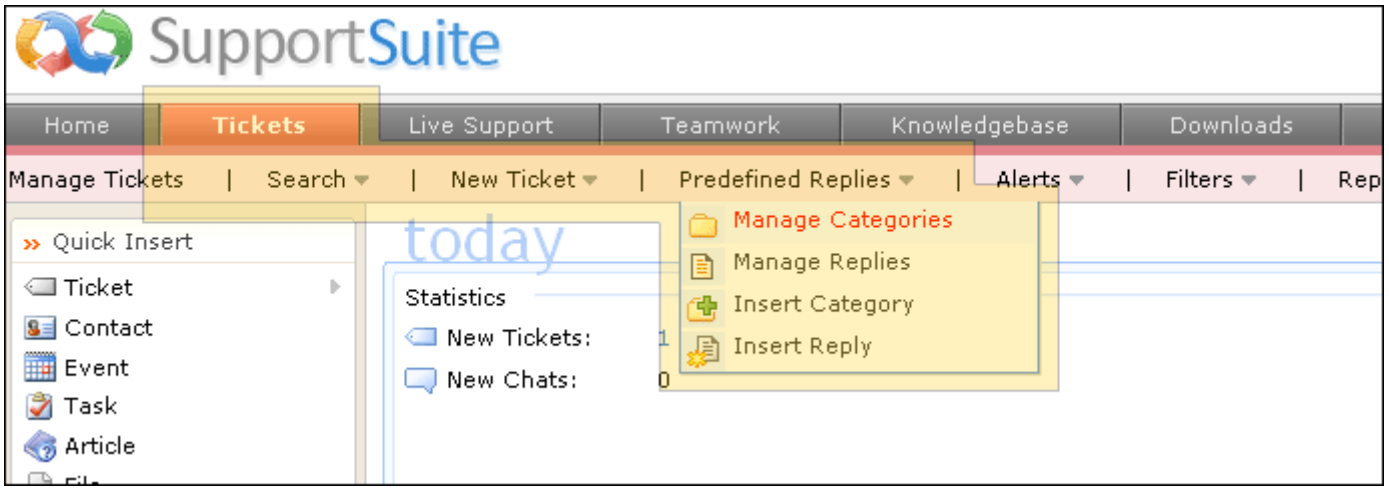
To **edit** a category, click on the corresponding **edit category** link.

Refer to predefined reply category fields for documentation on the required fields for a new predefined category.

Creating a category

To create a predefined reply category:

1. Open **Tickets** on the navigation menu, as shown below.



2. Open the **Predefined Replies** sub-menu.
3. Click on **Insert Category**.

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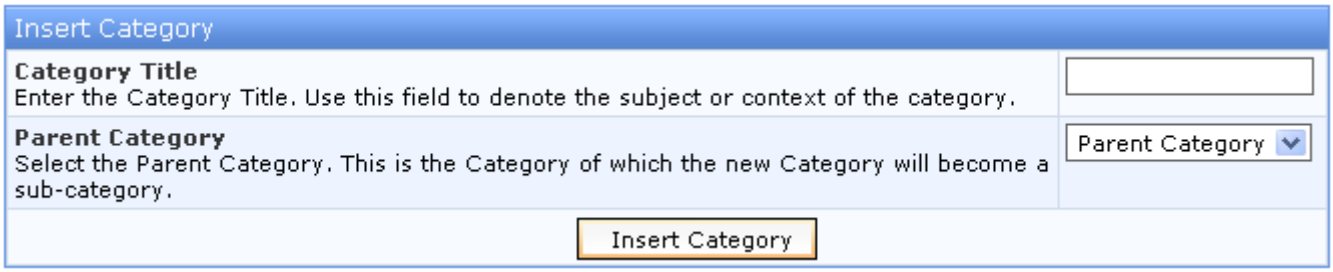
Refer to predefined reply category fields for documentation on the required fields for a new predefined category.

Predefined reply category fields

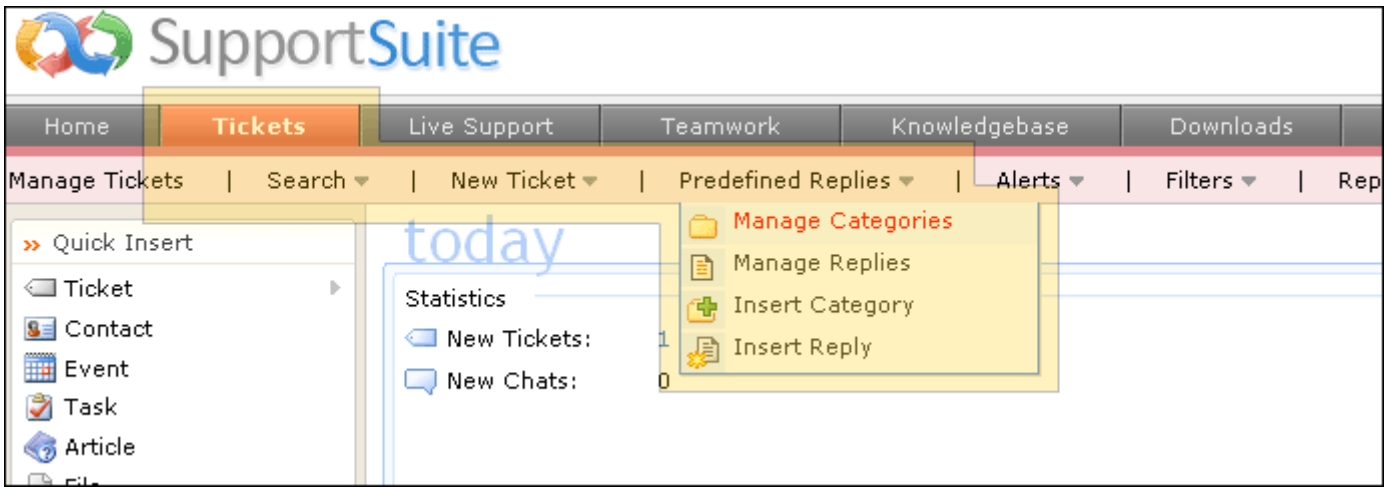

Insert Category
Category Title
Enter the Category Title. Use this field to denote the subject or context of the category.
Parent Category
Select the Parent Category. This is the Category of which the new Category will become a sub-category.
Parent Category
Insert Category

- **Category Title** – the title of the category.
- **Parent Category** – if the category is a sub-category of another, set the parent category here.

Managing predefined replies

To manage predefined replies:

1. Open **Tickets** on the navigation menu, as shown below.



2. Open the **Predefined Replies** sub-menu.
3. Click on **Manage Replies**.

A list of all predefined replies and their respective categories will be presented, as shown below.

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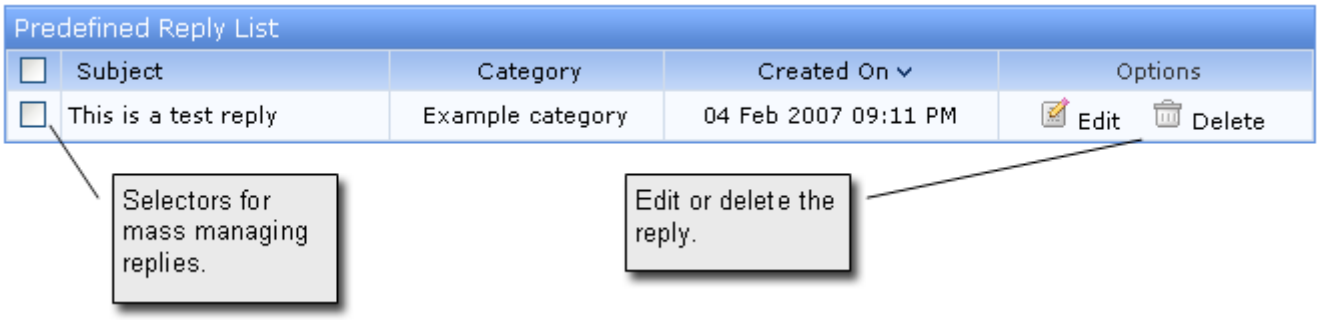
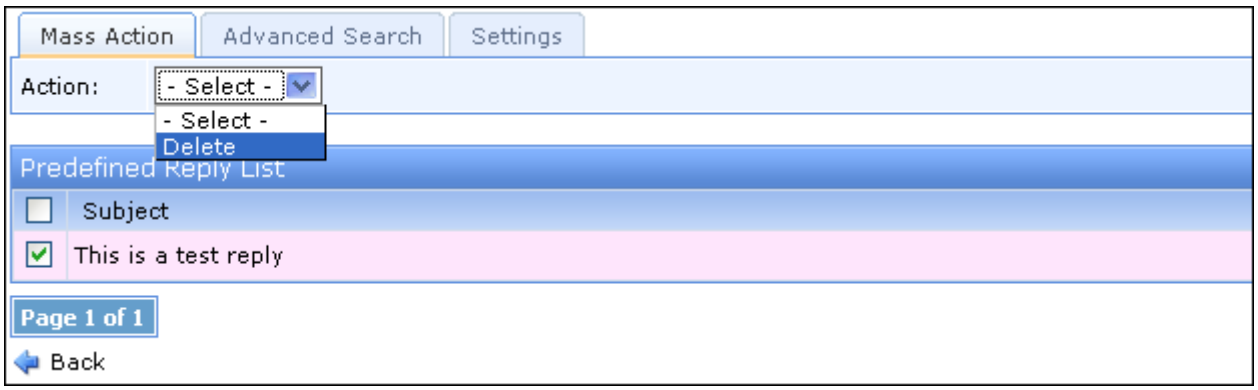


Selecting multiple predefined replies (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, replies can be mass-deleted. Under the **Advanced Search** tab, replies can be searched for by name. Under the **Settings** tab, the number of replies shown per page (if there are many) can be limited.



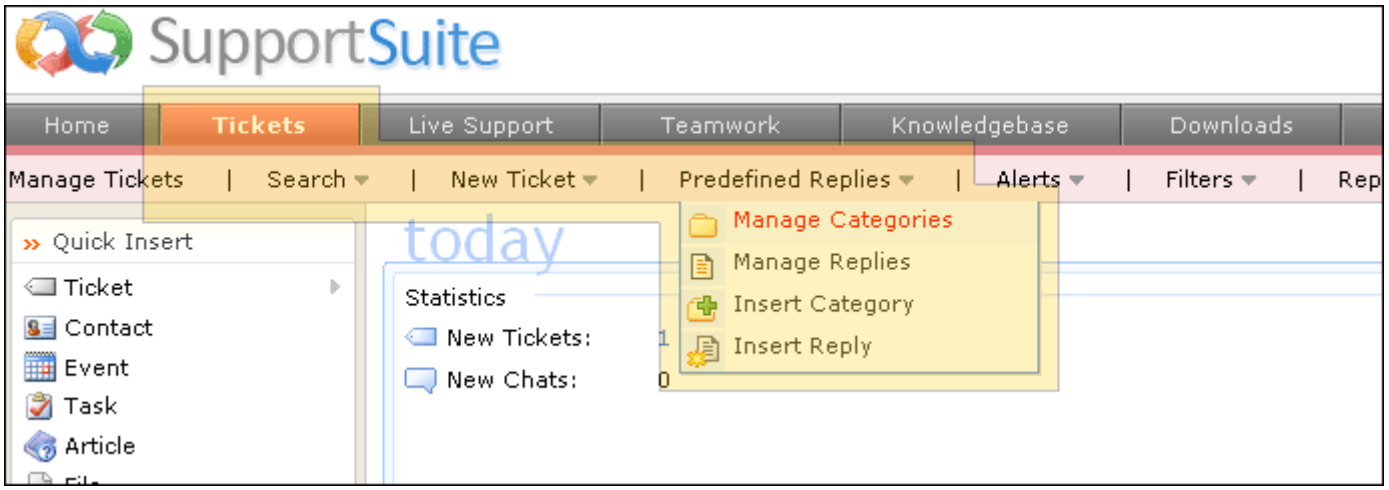
To **edit** a predefined reply, click on the corresponding edit icon.

Refer to predefined reply fields for documentation on the required fields for a new predefined reply.

Creating a predefined reply

To create a predefined reply:

1. Open **Tickets** on the navigation menu, as shown below.



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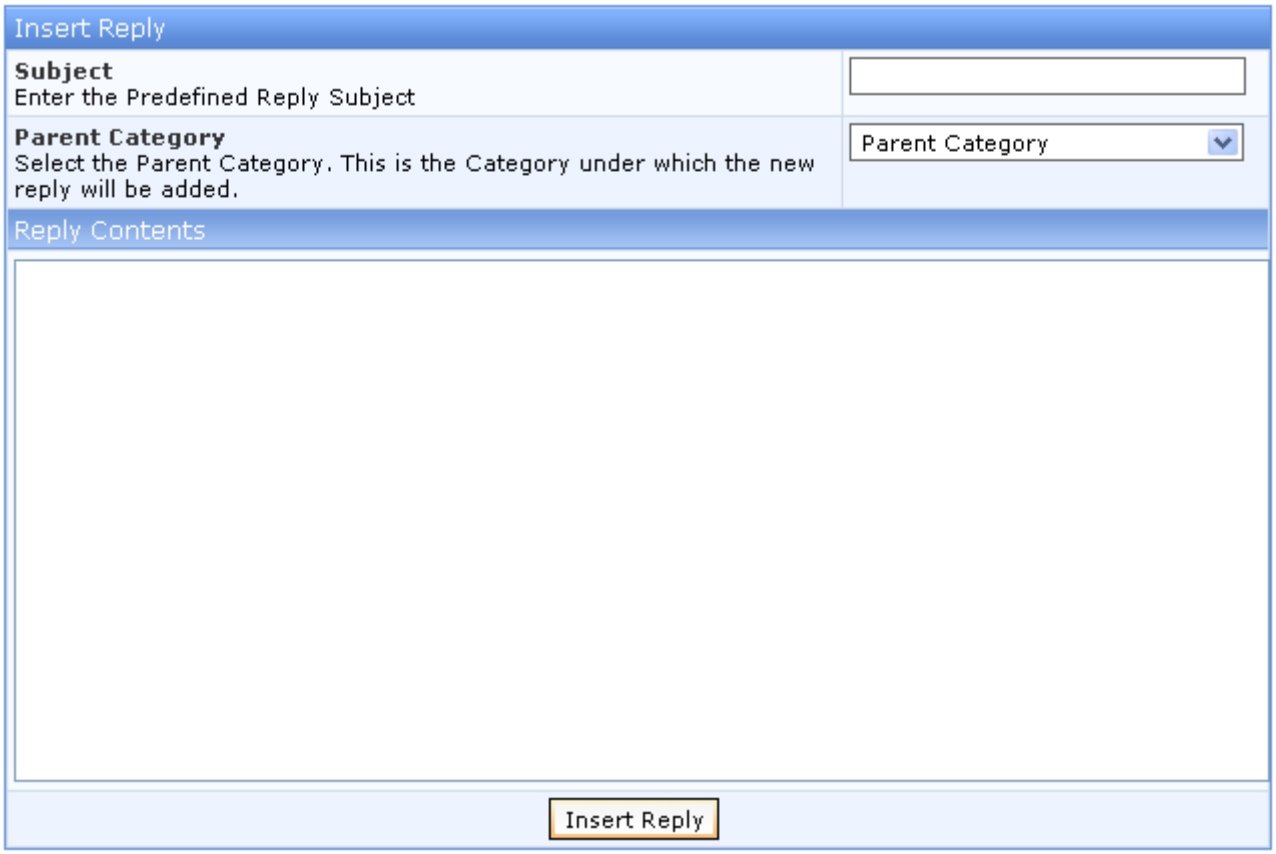
2. Open the **Predefined Replies** sub-menu.
3. Click on **Insert Reply**.

Refer to predefined reply fields for documentation on the required fields for a new predefined reply.

Predefined reply fields


Insert Reply
Subject
Enter the Predefined Reply Subject
Parent Category
Select the Parent Category. This is the Category under which the new reply will be added.
Parent Category
Reply Contents
Insert Reply

- **Subject** – the title of the predefined reply.
- **Parent Category** – the category in which the predefined reply will be saved.
- **Reply Contents** – the contents of the predefined reply.

Billing information and time tracking

The time spent working on a ticket and what of that is billable can be logged to a ticket, including a work summary.

Viewing billing and time tracking information

Time tracking and billing information for a ticket (if the data exists) will appear on the **ticket information bar** when viewing a ticket, as shown below.

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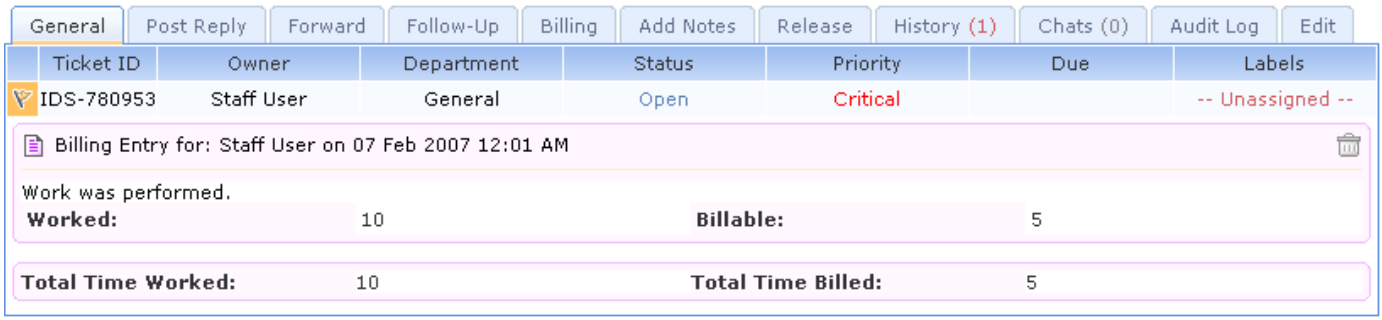
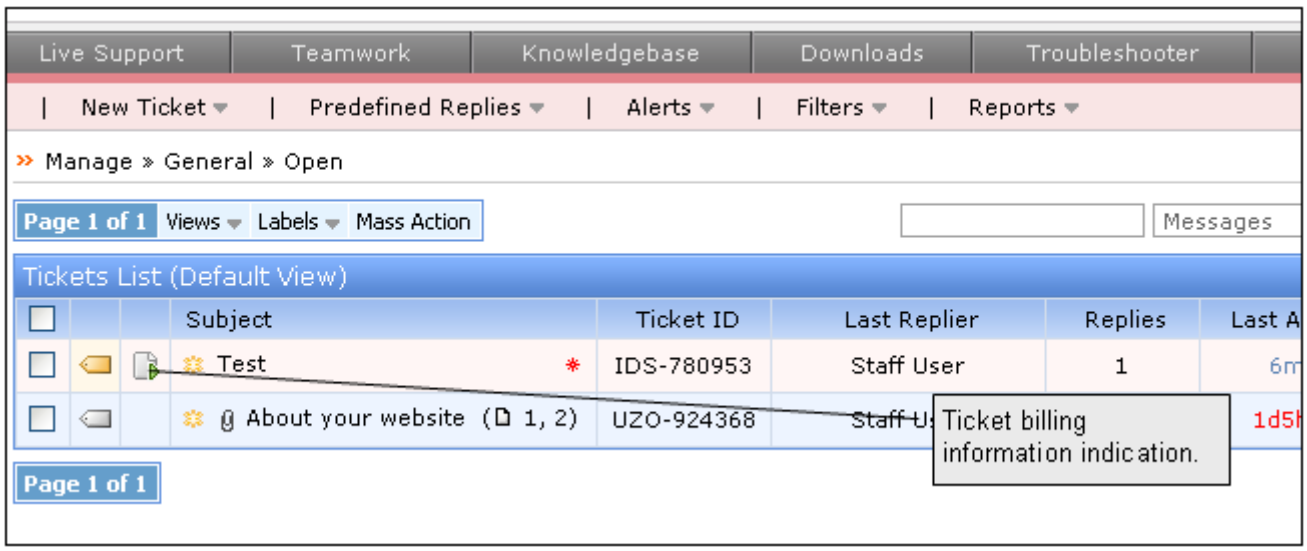
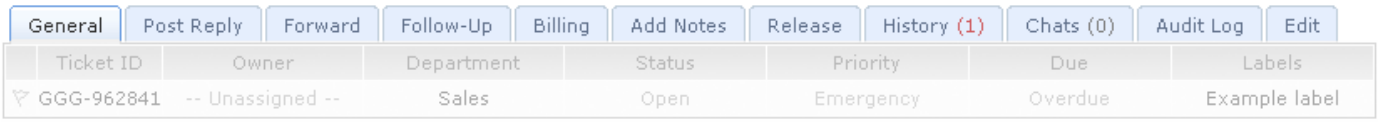


When billing or time tracking information has been added to a ticket, a ticket billing indication icon will be given within a **ticket listing**, as shown below.



Adding billing and time tracking information

Time tracking information can be logged to a ticket via the **ticket management menu** when viewing a ticket, as shown below.



To add time tracking information to a ticket, click on the **Billing** tab. This will open the billing/time tracking interface, as shown below.

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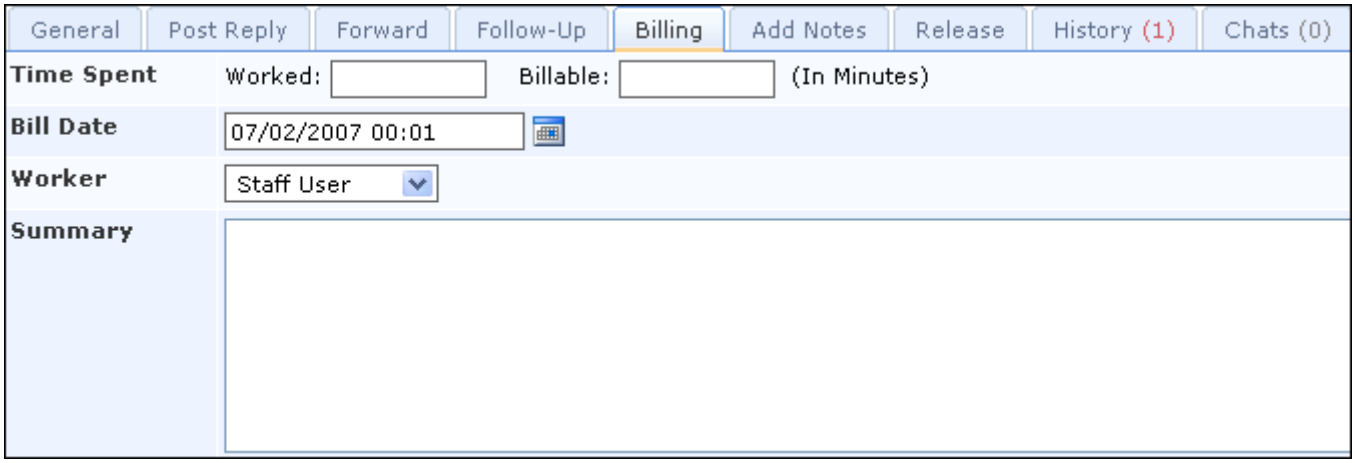
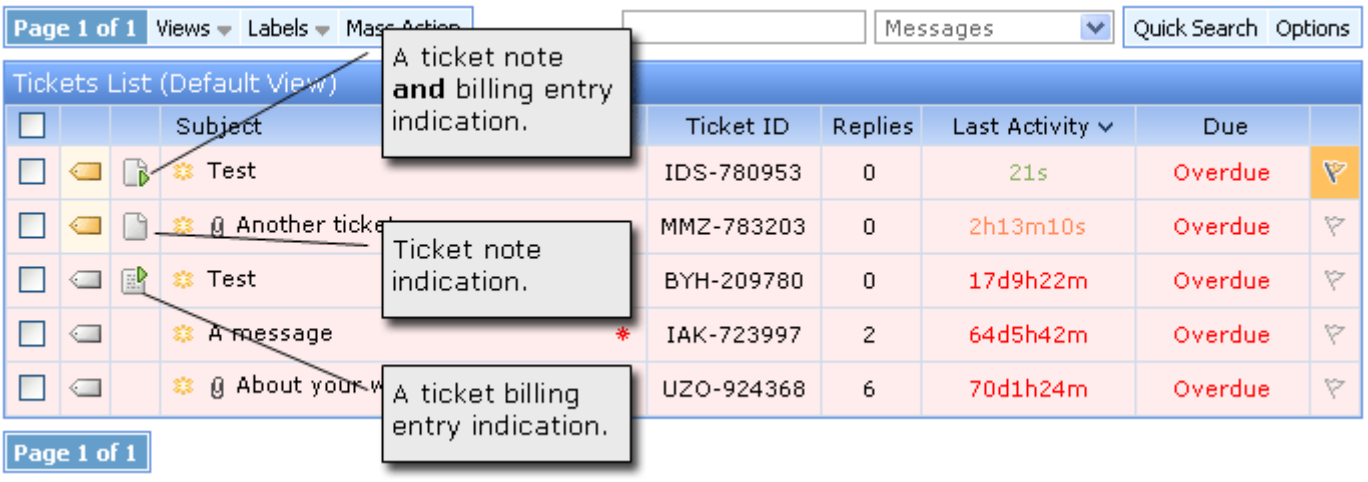


- **Time Spent**
  - **Worked** – the time spent (in minutes) working on this entry.
  - **Billable** – the time (in minutes) that are billable.
- **Bill Date** – the time of billing.
- **Worker** – which staff user performed the recorded work.
- **Summary** – details of the log.

When a billing or time tracking information has been added to a ticket an indication will be shown on a ticket listing, as shown below.



Removing billing or time tracking information

Time tracking and billing information for a ticket (if the data exists) will appear on the **ticket information bar** when viewing a ticket. As well as this, a **trash can** icon will appear next to each entry.

To delete an entry, click on its corresponding trash can icon, as shown below.

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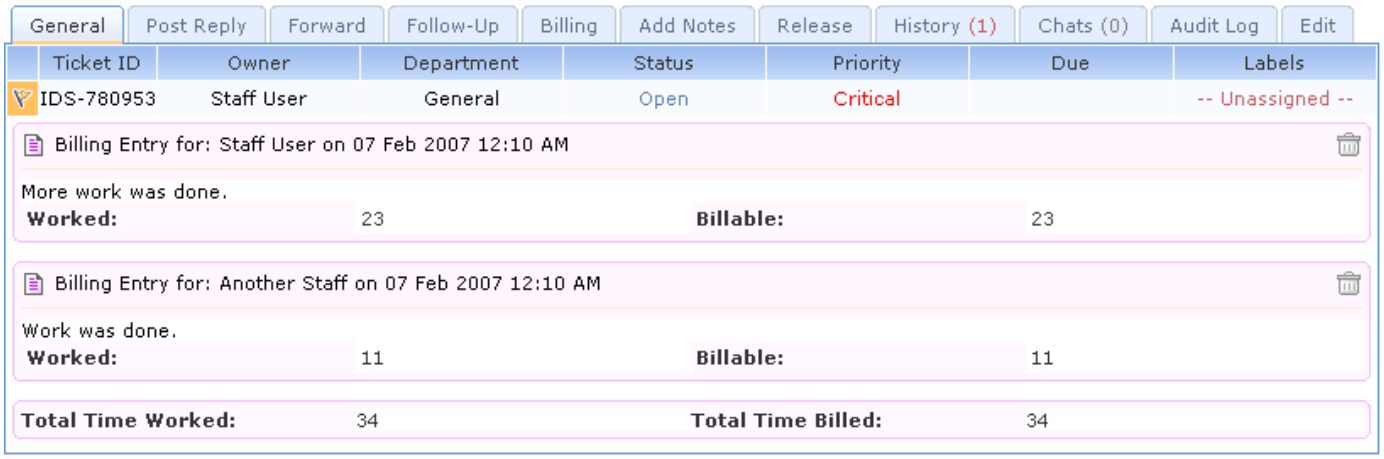
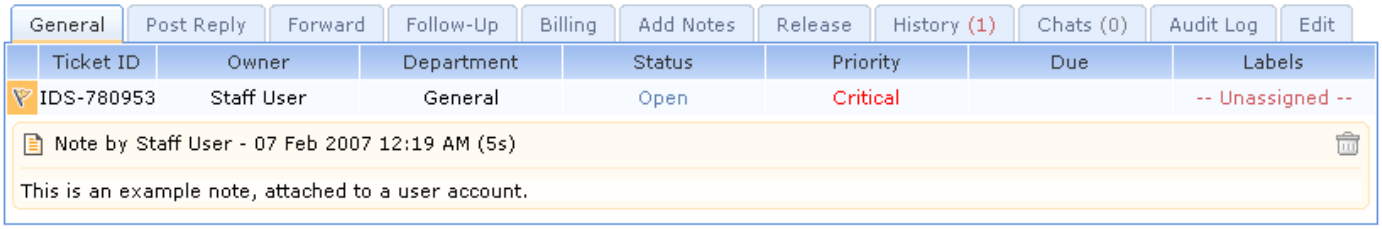


Ticket and user notes

Notes can be attached to tickets or user (client) accounts. These notes can be viewed only by **staff users** (or **specific staff users** – this is defined at note creation). Notes can be used to share information between staff users, or simply as a record whilst working on a ticket or dealing with a client.

Viewing a note

A note that is attached to a ticket will be visible on the **ticket information bar** when viewing the corresponding ticket. A note that is attached to a user account will be visible in the same place for **every** ticket the user creates, as shown below.



An indication that a note has been attached to the ticket will also be given from within a **ticket listing**, as shown below.

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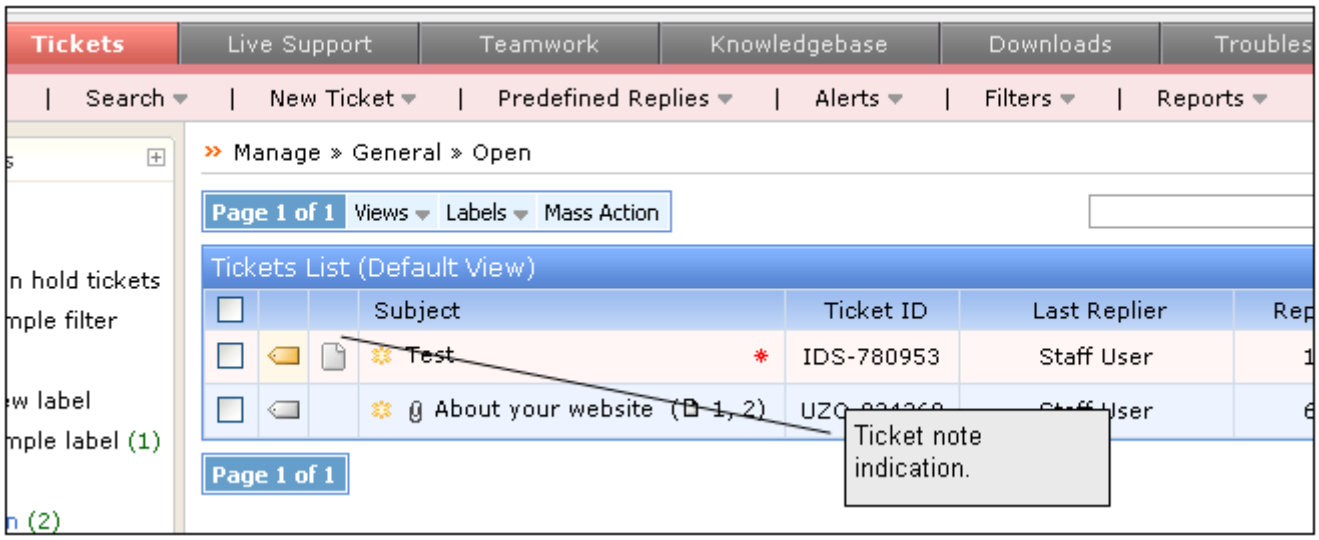
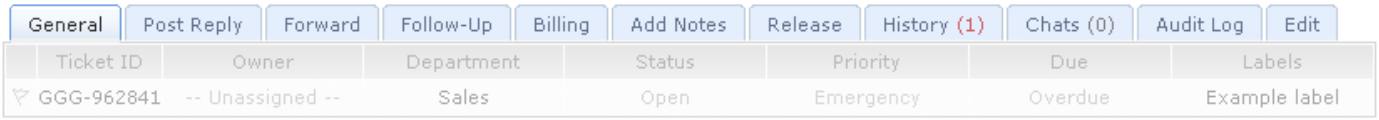
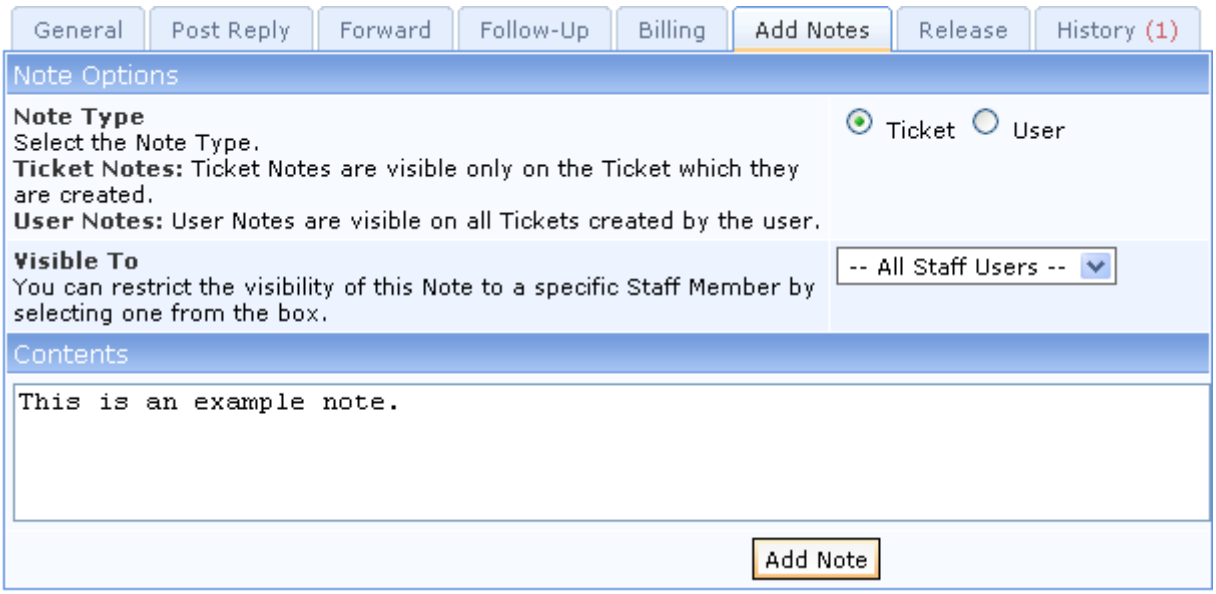


Adding a note

Notes can be attached to a ticket or user via the **ticket management menu** when viewing a ticket, as shown below.



To add a note, click on the **Add Notes** tab. This will open the **add note** interface, as shown below.



- **Note Type** – whether the note will be attached to the ticket or to the user account of the ticket creator.
- **Visible To** – to whom the note will be visible to. A note can be visible to all staff members or a specific staff member.
- **Contents** – the contents of a note.

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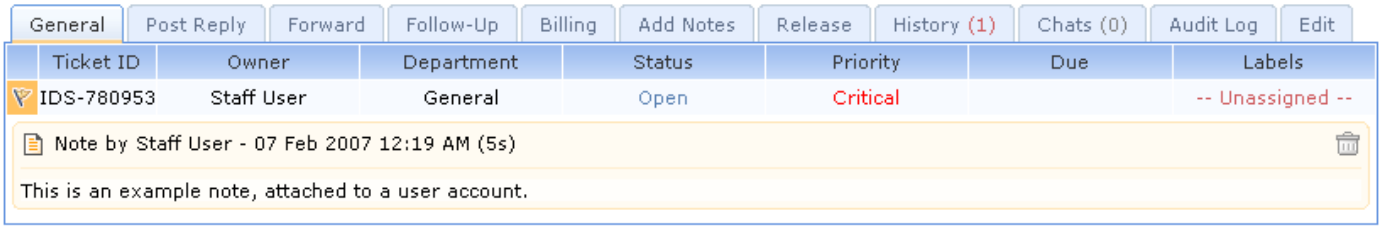
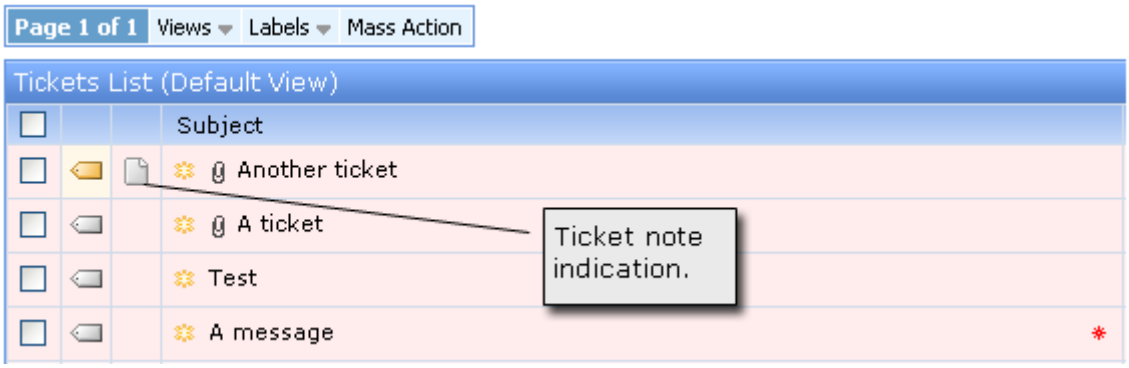
Once a note has been added, it can be viewed on the ticket information bar, as shown below.



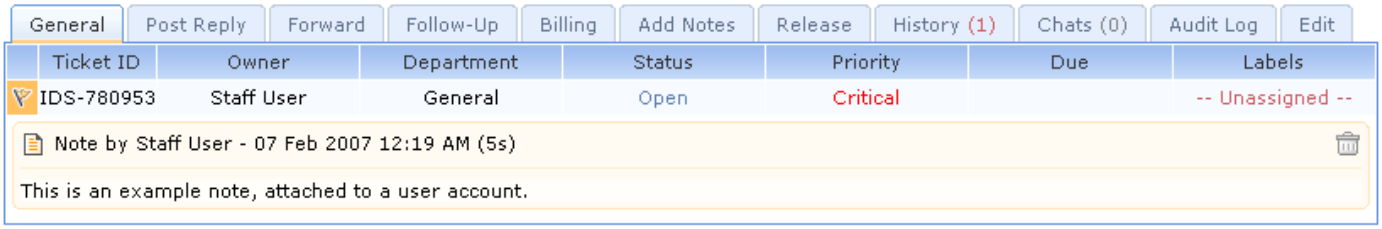
An indication that the ticket has had a note added to it will also be shown on a ticket listing, as shown below.



Note that when a note is added to a **user account**, the note will be visible on all tickets created by this user. The user will still not be able to see this note, however.

Deleting a note

Notes can be deleted via the **ticket information bar** when viewing a ticket, as shown below.



As well as this, a **trash can** icon will appear next to each note. To delete a note, click on its corresponding trash can icon.

Automatic ticket follow-ups

Ticket follow-ups allow for the **post dating** of ticket handling actions.

Here are some example uses of the ticket follow-up system:

- Using the ticket follow-up a reply to a ticket can be made "in the next X minutes".

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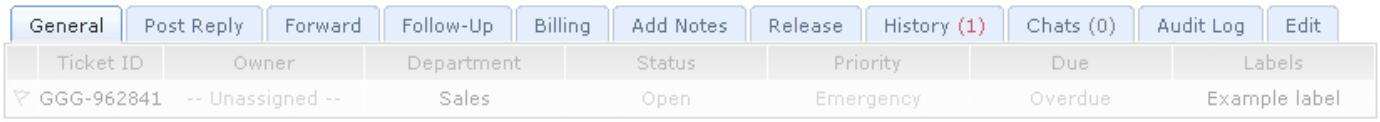
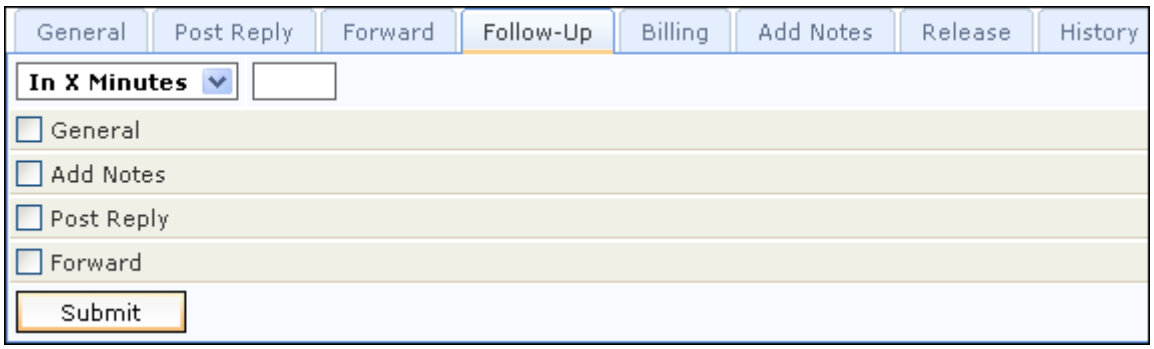
- To have an ongoing "Invoices" ticket that is closed by a staff member when paid, but as a ticket follow-up is told to reopen in 30 days time and post a ticket-reply, reminding the user that the next payment is due.

Adding a follow-up action

To add a follow-up action, click on the **Follow-Up** tab on the **ticket management menu** when viewing a ticket, as shown below.



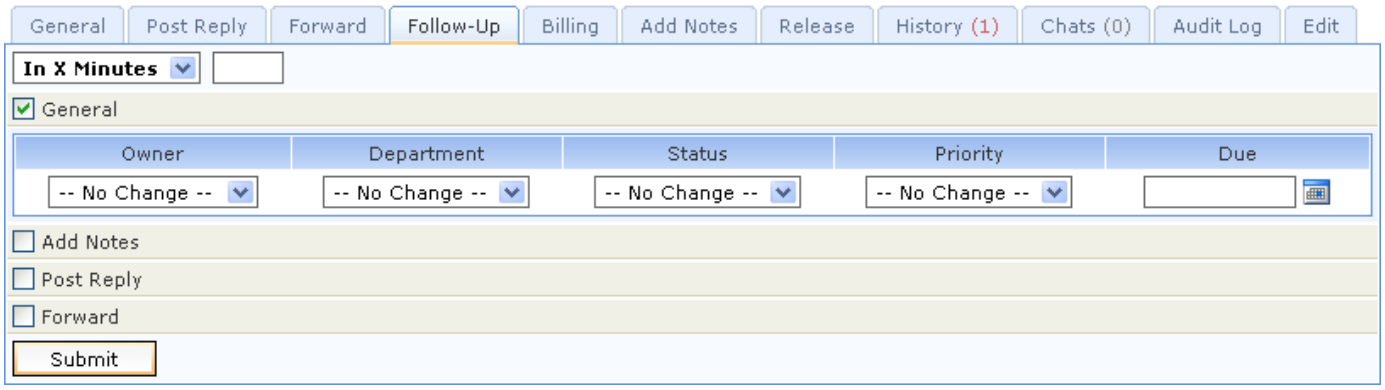
The follow-up actions interface will be opened, as shown below.



Follow-up actions can be combined. For example, a ticket can be replied to as well as opened within the same follow-up entry.

The **general** actions can be used to:

- Change the owner (ticket assignment) of a ticket.
- Change the department a ticket resides in.
- Change a ticket's status.
- Change a ticket's priority.
- Set a due time for the ticket.



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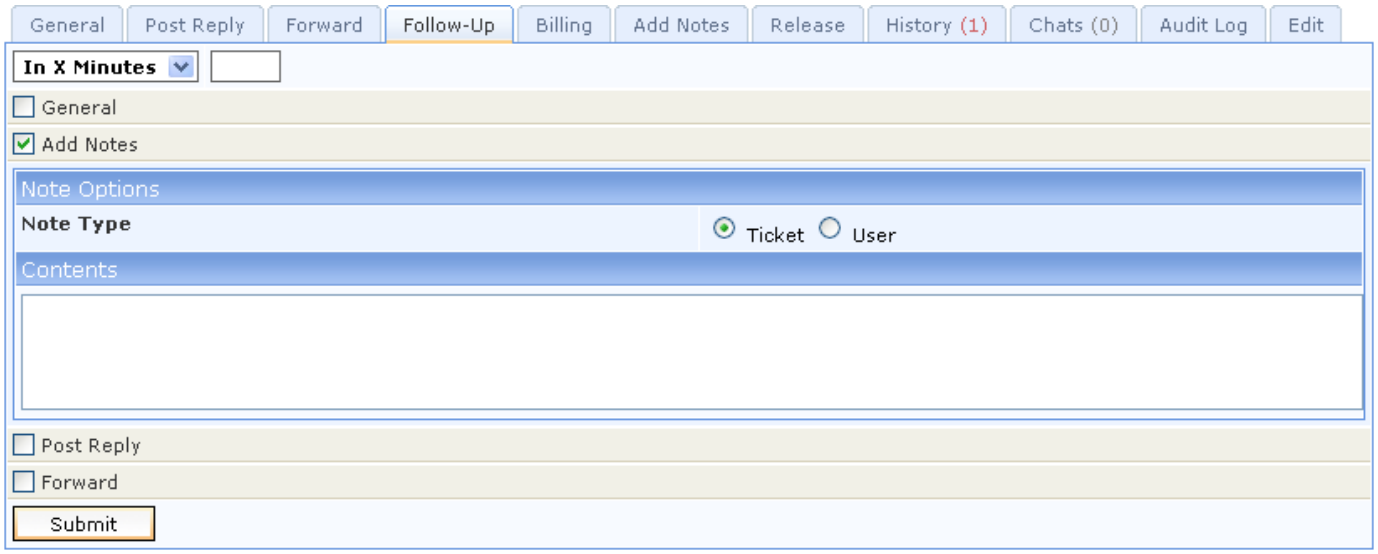
The **add notes** action can be used to:

Add a note to a ticket or user. For more information on ticket and user notes, see ticket and user notes.



The **post reply** action can be used to:

Post a ticket reply to the ticket. For more information on ticket replies, see replying to a single ticket.

The **forward** action can be used to:

Forward the ticket to an address. For more information on ticket forwarding, see forwarding a ticket.

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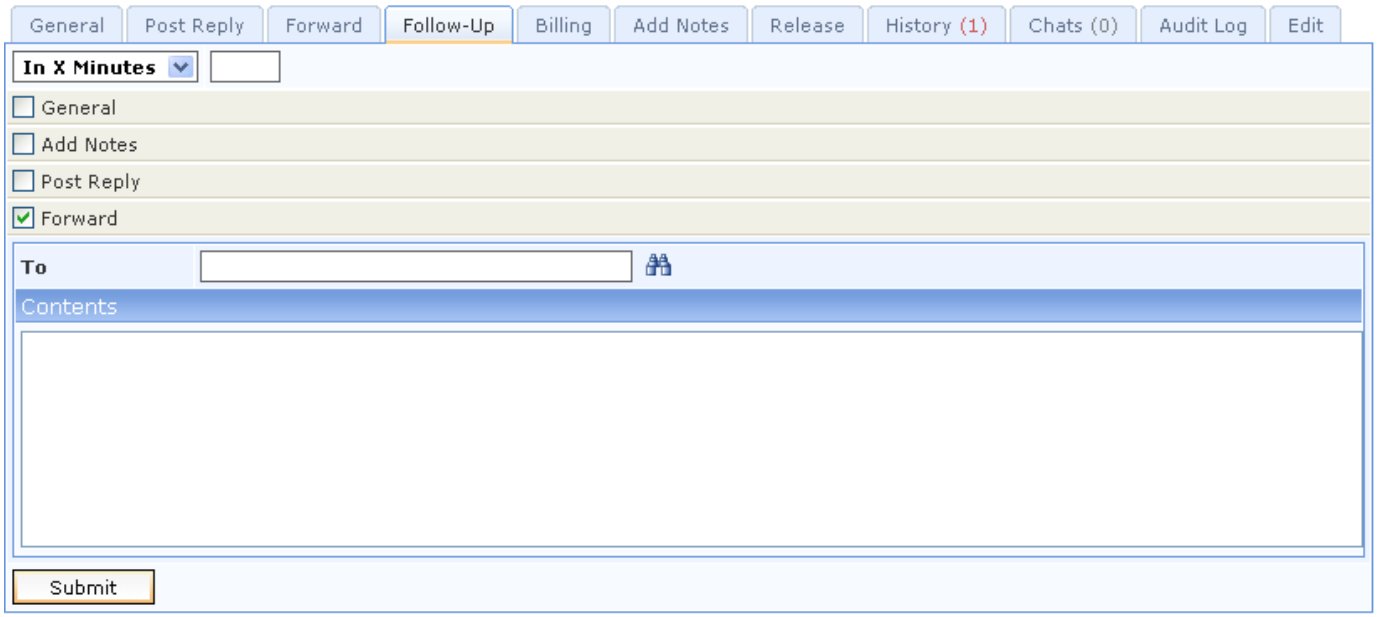
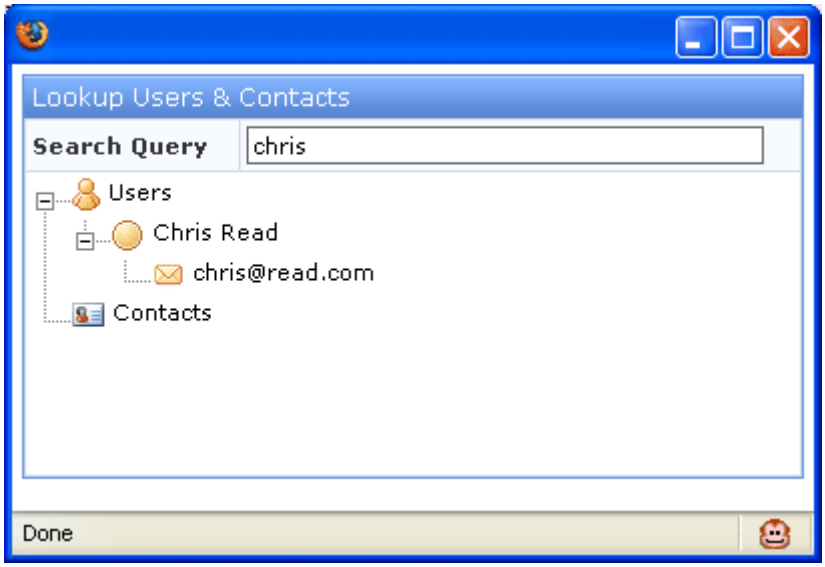


Clicking on the **binoculars** icon will open up a contacts search window, allowing the search of addresses stored in the **contacts list** and **user accounts**, as shown below.



The search will be performed **as you type**. Clicking on a matched e-mail address will insert the address into the **Forward To** field.

Ticket and chat history records

SupportSuite databases a **ticket** and **chat** history for all user accounts.

A ticket and chat history for a user can be viewed in two areas – from within a ticket created by the user and from within the user's account page within the **staff control panel**.

From within a ticket, the **ticket** can be accessed from the **ticket management menu** by clicking on the **History** tab, as shown below.

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General | Post Reply | Forward | Follow-Up | Billing | Add Notes | Release | History (2) | Chats (0) | Audit Log | Edit

Ticket ID	Subject	Date	Department	Status	Priority
UZO-924368	About your website	18 Jan 2007 01:22 PM	General	Open	High
YRT-584563	Another ticket from me	07 Feb 2007 09:46 PM	General	Open	Urgent

Similarly, the **chat** history is accessed by clicking on the **Chats** tab, as shown below.

General | Post Reply | Forward | Follow-Up | Billing | Add Notes | Release | History (2) | Chats (6) | Audit Log | Edit

Chat ID	Full Name	Staff Name	Department	Date
1	Chris	Test	General	07 Feb 2007 10:12 PM
2	Chris	Test	General	07 Feb 2007 10:13 PM
3	Chris	Test	General	07 Feb 2007 10:14 PM
4	Chris	Test	General	07 Feb 2007 10:23 PM
5	Chris	Test	General	07 Feb 2007 10:30 PM
6	Chris	Test	General	07 Feb 2007 10:34 PM

Clicking on the **Full Name** of the user will take you to the corresponding chat history. For more information, see chat history.

Ticket audit log

The **audit log** of a ticket details every action performed by the **user**, **system** or a **staff user** on a ticket. The audit log provides a powerful way of overseeing the path a ticket has taken through the support system, and is secure in that log entries cannot be modified using the SupportSuite interface.

An example of a ticket's audit log is shown below.

General | Post Reply | Forward | Follow-Up | Billing | Add Notes | Release | History (2) | Chats (6) | Audit Log | Edit

Description	Date	Timeline	Entry Type
Setting Due Time To: 08 Feb 2007 09:46 PM	07 Feb 2007 09:46 PM	23h8m30s	System
New Ticket Created By Chris	07 Feb 2007 09:46 PM	23h8m30s	Client
Ticket Department Changed From: General To: Sales	08 Feb 2007 08:39 PM	15m46s	Staff User (Staff)
Setting Due Time To: 09 Feb 2007 08:39 PM	08 Feb 2007 08:39 PM	15m46s	System
Ticket Due Time Cleared By: Staff User	08 Feb 2007 08:39 PM	15m26s	Staff User (Staff)
New Reply Created By Staff User (staff@user.com)	08 Feb 2007 08:39 PM	15m26s	Staff User (Staff)
Ticket Due Time Set To: 10 Feb 2007 12:00 AM By: Staff User	08 Feb 2007 08:39 PM	15m26s	Staff User (Staff)

The **oldest** action will be shown first. When two actions (for example) are logged at exactly the same time (as shown above – "Setting Due Time" and "New Ticket Created"), the very first action logged will be displayed **second**.

This is a listing quirk that occurs because the actions occurred at exactly the same time. Obviously, the ticket was **created** first and then the **due time** was set by the system for the new ticket.

A logged action performed by the system will have an **Entry Type** of **System**. Some system actions include automatically setting a **due time** according to an SLA plan, or automatically **closing** a ticket if auto-close has been enabled from within the **administrator control panel**.

The following actions will be logged by the audit log:

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- **New Ticket Created By: X** – log of the ticket creation.
- **New Reply Created By: X** – log of a ticket reply by the client or a staff user.
- **New Forward Message Created By: X** – the ticket and some of or all of the reply contents have been forwarded by a staff user.
- **Ticket Owner Changed From X To: Y** – the owner of a ticket has been changed (the ticket has been reassigned).
- **Ticket Priority Changed From: X To: Y** – the priority of the ticket has been changed.
- **Ticket Status Changed From: X To: Y** – the status of the ticket has been changed.
- **AUTO CLOSE: Ticket Status Changed From: %s To: %s** – the auto-close system (configured within the administrator control panel) has been triggered and has changed the status of the ticket.
- **Ticket Department Changed From: X To: Y** – the ticket has been moved to a different department.
- **Ticket Escalated under Rule: X** – a ticket escalation path has taken effect.
- **Setting Due Time To: X** – the due time of the ticket has been set.
- **SLA Plan Set To: X** – the ticket has been assigned an SLA plan.
- **Ticket Flagged To: X By: Y** – the ticket has been flagged.
- **Ticket Flag Cleared By: X** – the ticket's flag has been cleared
- **Ticket Exported as XML By: X** – the ticket has been exported in XML format by a staff user.
- **Ticket Exported as PDF By: X** – the ticket has been exported in PDF format by a staff user.
- **Ticket Due Time Set To: X By: Y** – the ticket's due time has been set.
- **Ticket Marked as Overdue By: X** – the ticket has been marked as overdue.
- **Ticket Due Time Cleared By: X** – the ticket's due time has been cleared.
- **Ticket Note Added By: X** – a ticket note has been appended to a ticket.
- **User Note Added By: X** – a user note has been appended to the user's account from within the ticket.
- **Ticket Note Deleted By: X** – a ticket note has been deleted.
- **Ticket Printed By: X** – a ticket has been exported into a printer friendly view.
- **Ticket Post Deleted By: X** – a ticket reply has been deleted.
- **Ticket Draft Cleared By: X** – draft contents of a ticket reply have been cleared.
- **Ticket Draft Saved By: X** – draft contents of a ticket reply have been saved.

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- **Ticket Forwarded To: X By: Y** – the ticket and some of or all of the reply contents have been forwarded by a staff user.
- **Ticket Recipient: X Deleted By: Y** – a ticket recipient has been deleted.
- **Time Tracking Entry #X Deleted By: Y** – a time tracking or billing entry has been deleted.
- **Time Tracking Entry Added For: X By: Y (Worked: %s Billable: Z)** – time tracking or billing information has been added to the ticket.
- **Processed under Parser Rule: X** – the e-mail was received and processed under the parser rule before being processed into a new ticket.
- **Ticket Merged With #X** – ticket has been merged with another.
- **Deleted Ticket. Ticket ID: #%s, Subject: %s, Fullname: %s, Email: %s** – ticket has been deleted.

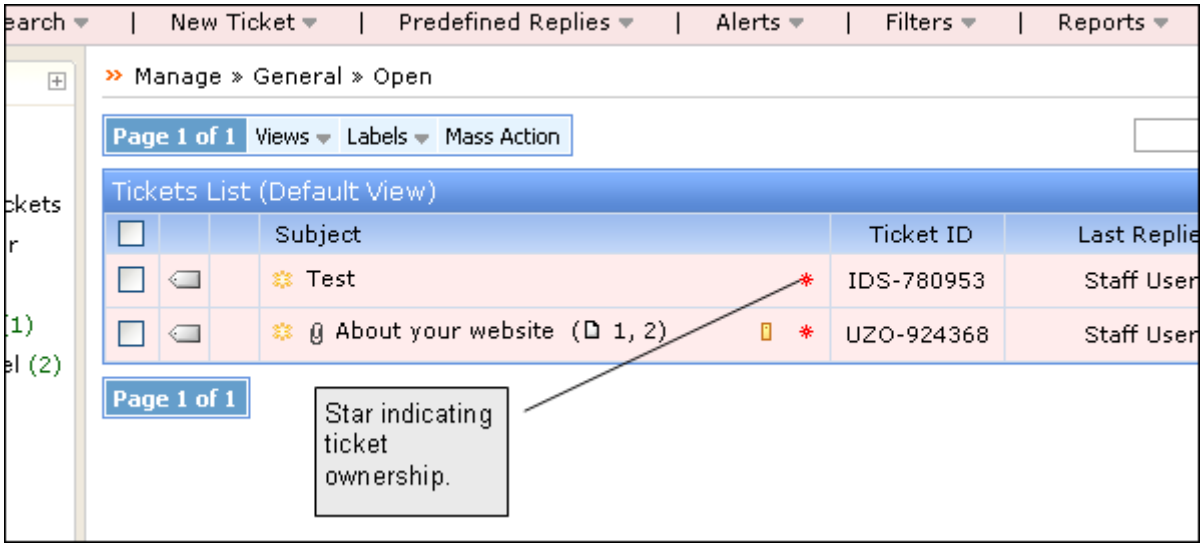
Ticket assignment and ownership

A ticket can be "**owned**" by or **assigned to** a particular staff user.

When a ticket is assigned to a staff user, only that staff user will be able to view the ticket unless the staff user explicitly chooses to view tickets not assigned to themselves (see customized ticket listing view).

When a ticket is assigned to a staff user, the staff user will receive an e-mail notification of ticket assignment.

When viewing a ticket listing, tickets that are assigned to yourself will be indicated by a red star, as shown below.



Assigning a ticket

To assign a ticket from within a ticket view:

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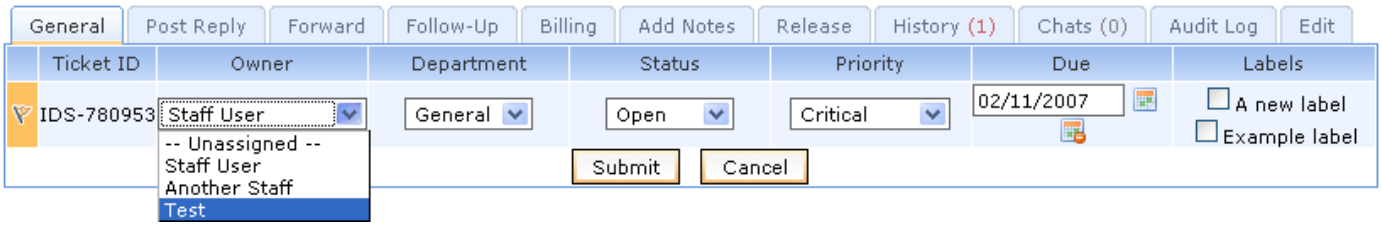
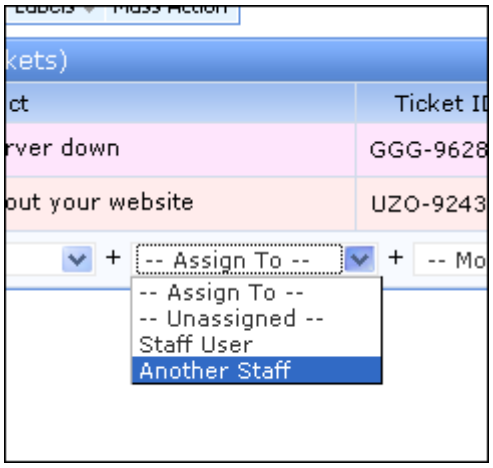
1. On the **ticket information bar**, click on **Owner** as shown below.



2. Select the name of the staff user to whom you wish to assign the ticket.

To assign a ticket from within a ticket listing view:

1. Select the tickets you wish to assign.
2. On the **mass-management menu bar** (as shown below), select the name of the staff user to whom you wish to assign the ticket.
3. Click on the **Submit** button to perform the setting changes.



Releasing a ticket (cumulative actions made when replying)

An assigned or owned ticket can be released to another staff user or to **no one**. In one action, multiple properties of a ticket can be changed (such as status, ticket owner, ticket priority) including adding a ticket note.

To release a ticket from within a ticket view:

1. On the **ticket management menu**, click on the **Release** tab as shown below.

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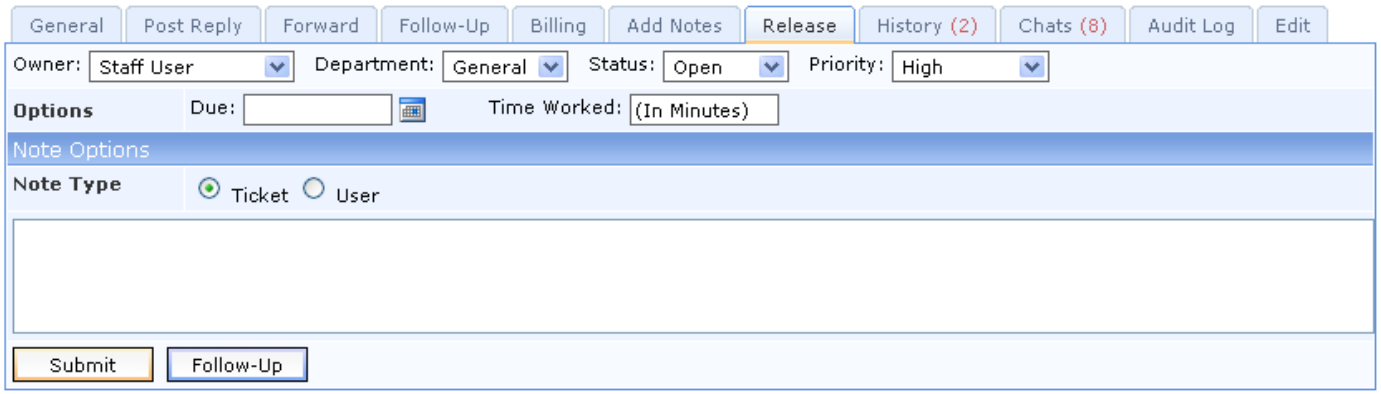


2. Then, do as appropriate:

    a. Select a new **Owner** (or to assign the ticket to nobody, set the owner to **– Unassigned --**).

    b. Select the ticket's **Department**.

    c. Select the ticket's **Status**.

    d. Select the ticket's **Priority**.

    e. Set a **Due time** for the ticket.

    f. Enter the amount of **Time worked** on the ticket.

    g. Attach a **Note** to the ticket or the user's account.

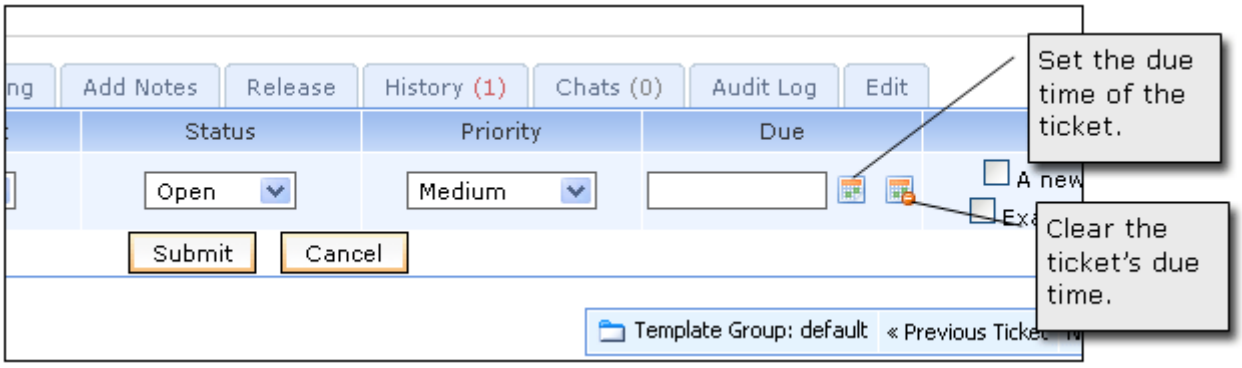
    h. Add a **Follow-up** action for the ticket.

Click on the **Submit** button to release the ticket and perform the property changes.

Ticket due times

Ticket due times can be set both manually and automatically (by the system). A case where a ticket may have it's due time set automatically is if the ticket applies to a certain **SLA plan** (see SLA in the administrator control panel).

A ticket's due time can also be set manually when viewing a ticket, as shown below.



Click on the calendar icon (as shown above) to open the date selector.

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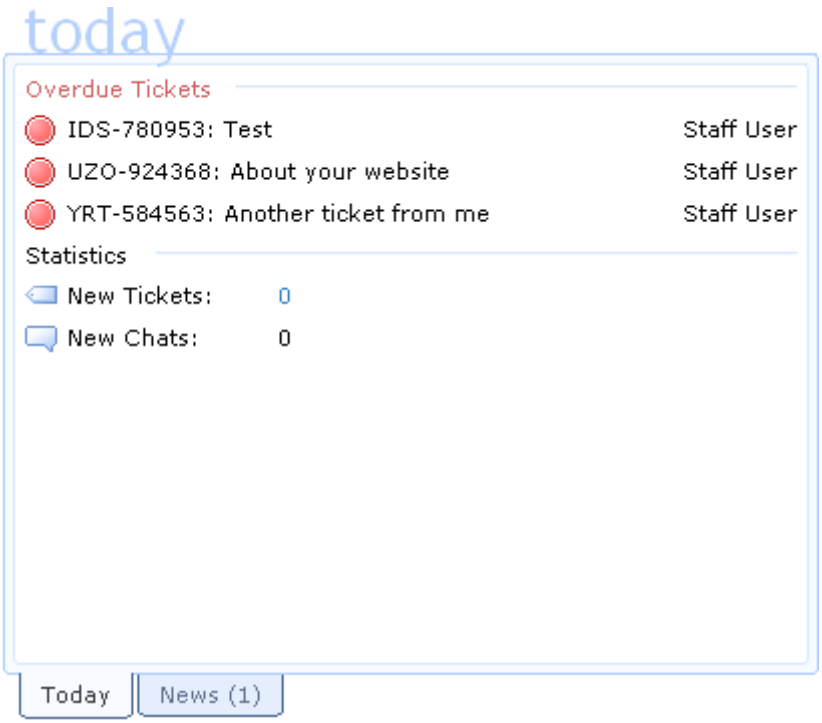
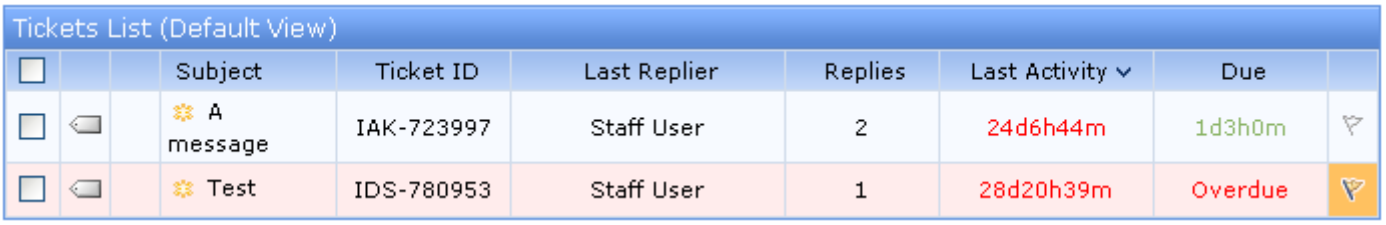
When a ticket becomes **overdue** (i.e. the due time expires), the ticket will be marked as such in the ticket listing and the ticket will also appear on the **dashboard** of the **staff control panel**, as shown below.



When a ticket is overdue, a ticket's **row color** will turn a deeper shade of pink/red in a ticket listing, as shown below.



Note that this color change must not be confused with a **high priority** ticket (as configured in the administrator control panel), where the color change is similar but not as deep.

Assigning a specific ticket to an SLA plan

SLA plans can be set up to automatically apply to a department (and/or a set of statuses, priorities and so on) – see SLA in the administrator control panel..

SLA plans can also be assigned to tickets that match certain rules in the mail parser (see mail parser in the administrator control panel).

To assign a ticket to an SLA plan from within the staff control panel:

1. Open the ticket (by clicking on the ticket's name from within a ticket listing).
2. On the **Ticket Options** menu, click on **SLA**, as shown below.

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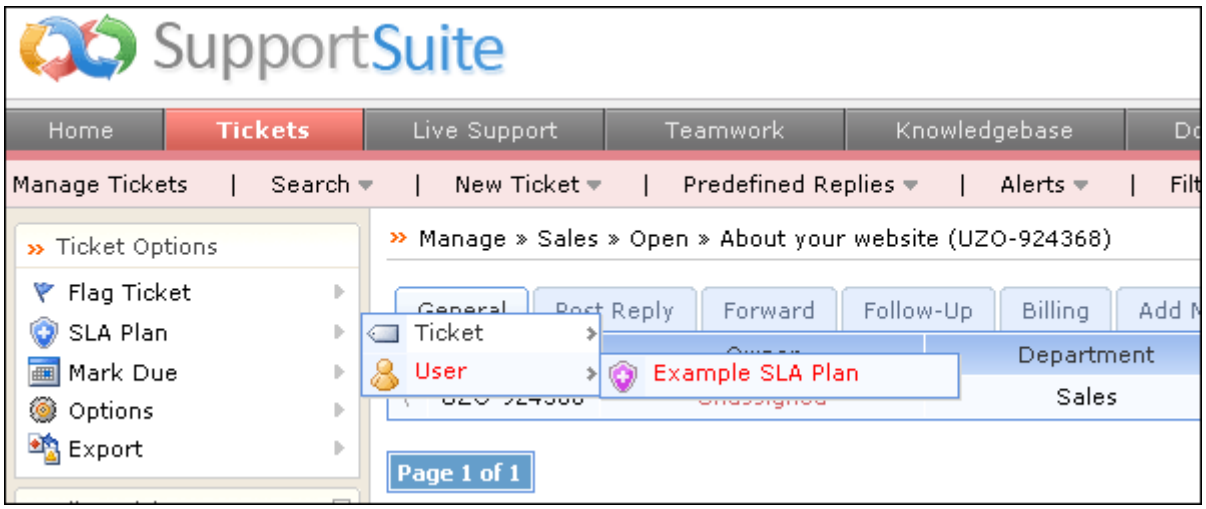


3. Select the appropriate SLA plan.

The ticket's due time will not abide by the assigned SLA plan's overdue timings and schedule.

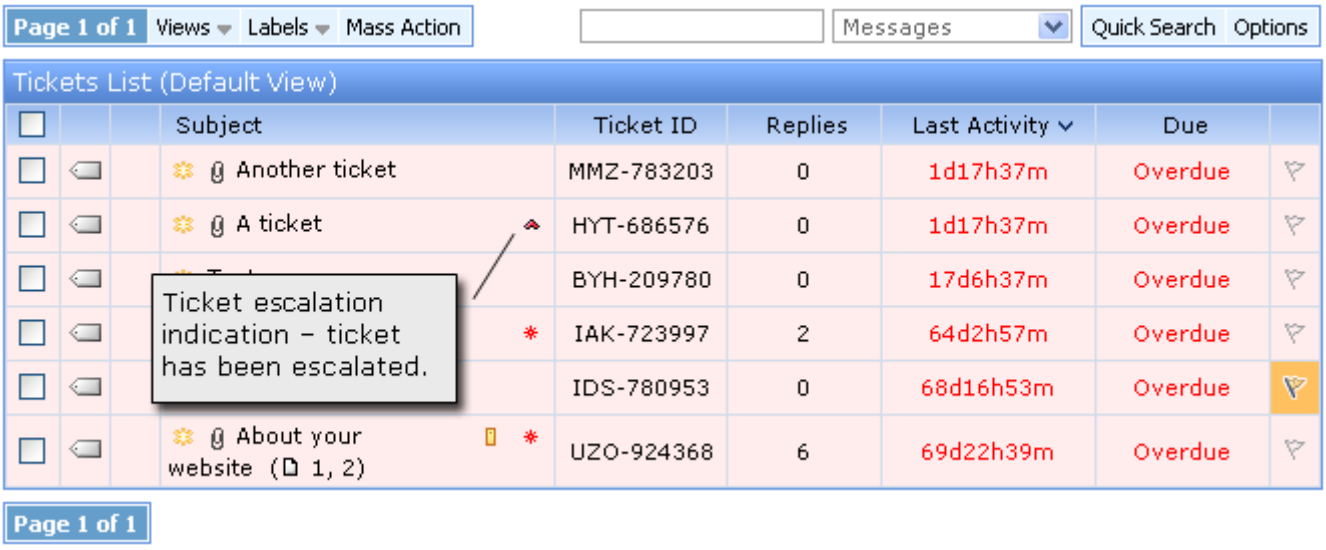
Escalated tickets

Escalation rules (if defined) come into effect when a ticket gets marked as overdue under a certain SLA plan. Escalations rules can be used to perform a set of specified actions when this event occurs – such as assigning the ticket to a staff member or moving the ticket's department.

For information on how SLA plans work, see SLA in the administrator control panel. For information on escalation rules and setting up escalation rules, see escalations rules in the administrator control panel.

An example use of escalation rules is seen in a company with a support department which is lead by two superior support managers. When a ticket turns overdue, an escalation rule can be set up to assign this ticket to one of the support managers and set the ticket's priority to **urgent**.

When a ticket is escalated, the escalated symbol will be shown on a ticket listing, as shown below.



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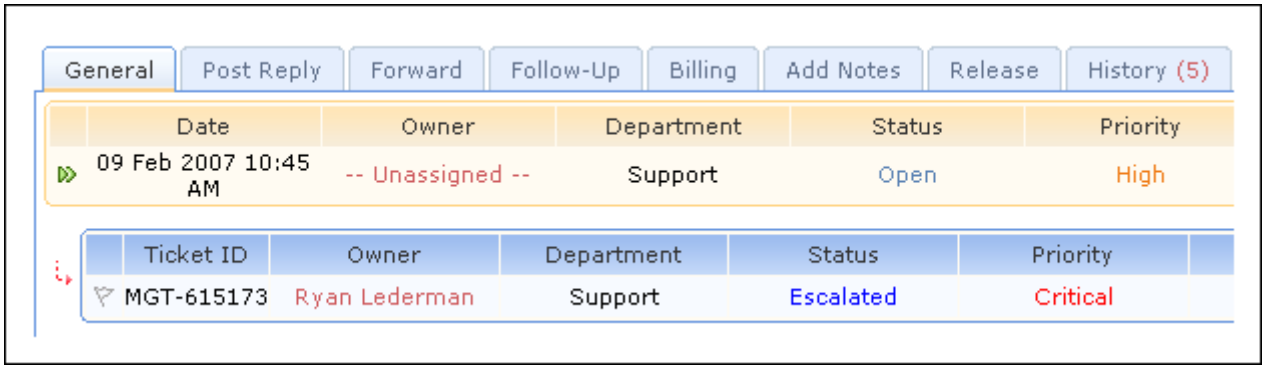
When viewing a ticket, the ticket information bar will be replaced with a **new** information bar, showing the ticket properties **after** escalation has occurred. An information bar detailing the original ticket properties (prior to escalation) will also be displayed, as shown below.



Ticket alerts

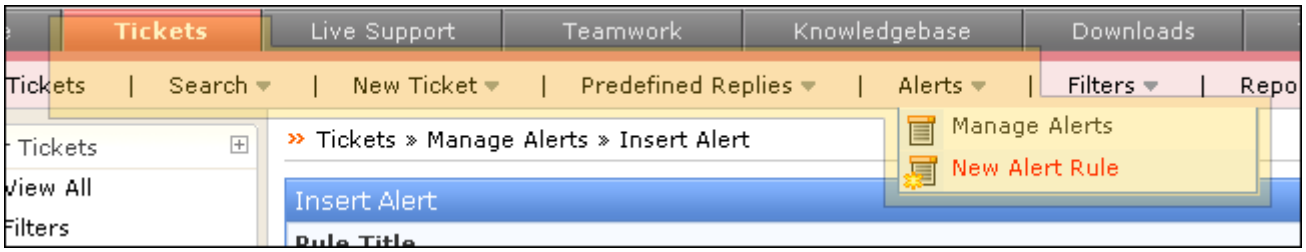
A **ticket alert** is processed (based on a set of criteria or rules) whenever a certain ticket-related action occurs, notifying by e-mail or SMS all staff users or one staff user of the event.

For example, a ticket alert can be created to e-mail add staff users when a **new ticket** is created of priority **urgent**.

Ticket alerts can be **public** or **private**. A public ticket alert is executed for **all staff members**, whereas a private ticket alert is executed only for yourself.

To view and manage ticket alerts:

1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **Alerts** sub-menu.
3. Click **Manage Alerts**.

A list of ticket alerts will be presented, as shown below.

To **delete** an alert click on the corresponding delete icon.

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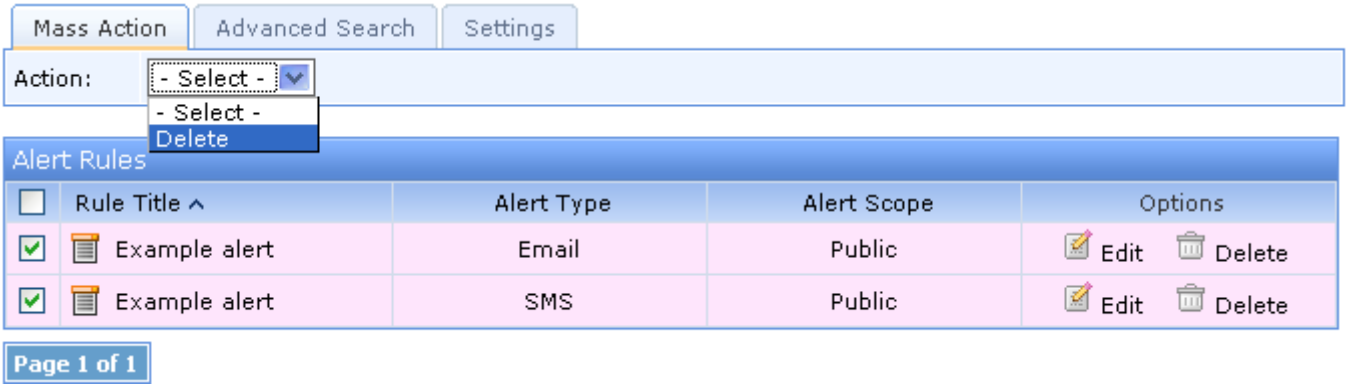
Selecting multiple ticket alerts (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, alerts can be mass-deleted. Under the **Advanced Search** tab, alerts can be searched for by name. Under the **Settings** tab, the number of alerts shown per page (if there are many) can be limited.

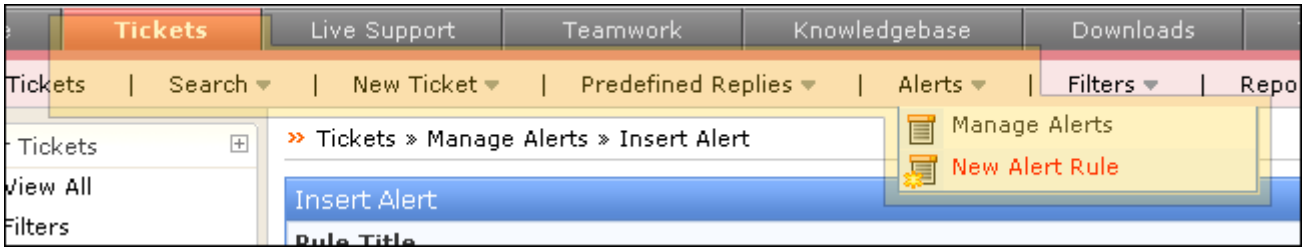


To edit a ticket alert, click on the corresponding **Edit** button. Refer to ticket alert fields for documentation on the required fields for editing a ticket alert.

Creating a new ticket alert

To create a new ticket alert:

1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **Alerts** sub-menu.
3. Click **New Alert Rule**.

You will be presented with a new alert form. Refer to ticket alert fields for documentation on the required fields for creating a new ticket alert.

Ticket alert fields

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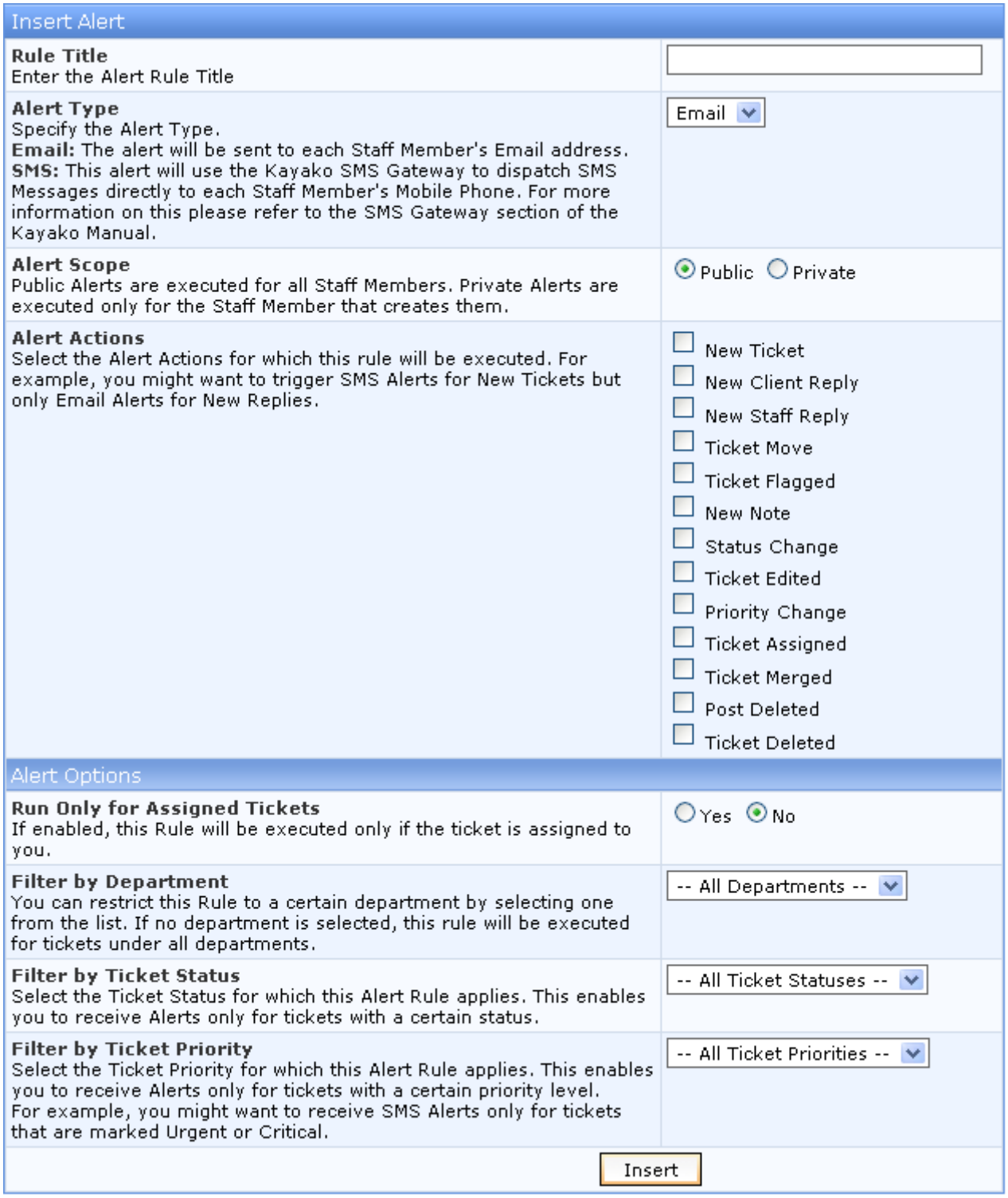
Insert Alert
Rule Title
Enter the Alert Rule Title
Alert Type
Specify the Alert Type.
Email: The alert will be sent to each Staff Member's Email address.
SMS: This alert will use the Kayako SMS Gateway to dispatch SMS Messages directly to each Staff Member's Mobile Phone. For more information on this please refer to the SMS Gateway section of the Kayako Manual.
Email
Alert Scope
Public Alerts are executed for all Staff Members. Private Alerts are executed only for the Staff Member that creates them.
Public
Private
Alert Actions
Select the Alert Actions for which this rule will be executed. For example, you might want to trigger SMS Alerts for New Tickets but only Email Alerts for New Replies.
New Ticket
New Client Reply
New Staff Reply
Ticket Move
Ticket Flagged
New Note
Status Change
Ticket Edited
Priority Change
Ticket Assigned
Ticket Merged
Post Deleted
Ticket Deleted
Alert Options
Run Only for Assigned Tickets
If enabled, this Rule will be executed only if the ticket is assigned to you.
Yes
No
Filter by Department
You can restrict this Rule to a certain department by selecting one from the list. If no department is selected, this rule will be executed for tickets under all departments.
-- All Departments --
Filter by Ticket Status
Select the Ticket Status for which this Alert Rule applies. This enables you to receive Alerts only for tickets with a certain status.
-- All Ticket Statuses --
Filter by Ticket Priority
Select the Ticket Priority for which this Alert Rule applies. This enables you to receive Alerts only for tickets with a certain priority level. For example, you might want to receive SMS Alerts only for tickets that are marked Urgent or Critical.
-- All Ticket Priorities --
Insert

- **Rule Title** – the title of the new alert.
- **Alert Type** – whether the alert should be sent out as an SMS message or as an e-mail.
- **Alert Scope** – if set to **public**, the alert will be executed for all staff members. If set to **private**, the alert will only be executed for yourself.

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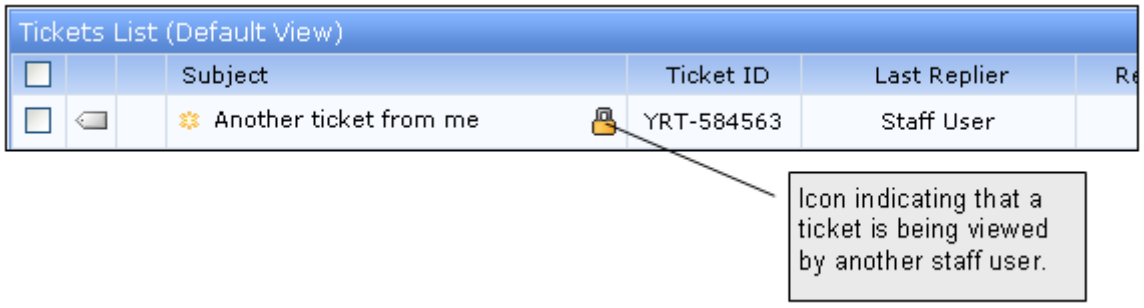
- **Alert Actions** – the alert will be triggered if these actions are performed. More than one action can be selected.
- **Run Only for Assigned Tickets** – if set to **yes**, the alert will only be executed for staff user(s) if the ticket is assigned to them. For more information on ticket assignments and ownership, see ticket assignment / ticket ownership.
- **Filter by Department** – if a department is set here, the alert will only be executed for tickets residing in this department.
- **Filter by Ticket Status** – if a ticket status is set here, the alert will only be executed for tickets of a certain status.
- **Filter by Ticket Priority** – if a ticket priority is set here, the alert will only be executed for tickets of a certain priority.

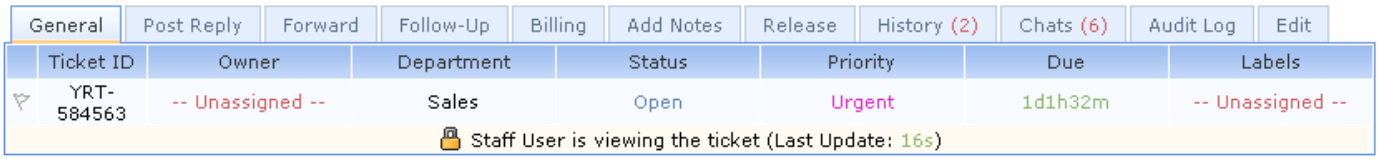
Ticket locking and staff-collision

Ticket locking is a feature that prevents more than one staff user replying to a ticket at the same time by indicating what staff user(s) (if any) are viewing or replying to a ticket.

When a staff user is viewing or replying to a ticket, an icon indicating as such will be shown for that ticket from within a ticket listing, as shown below.



When viewing a ticket, a more detailed indication will be given on the **ticket information bar**, as shown below.



If **Post Based Ticket Locking** is enabled in the **administrator control panel**, when more than one staff users begin replying to the same ticket will be indicated from within the ticket view, as well as a preview of what the other staff user(s) are typing, as shown below.

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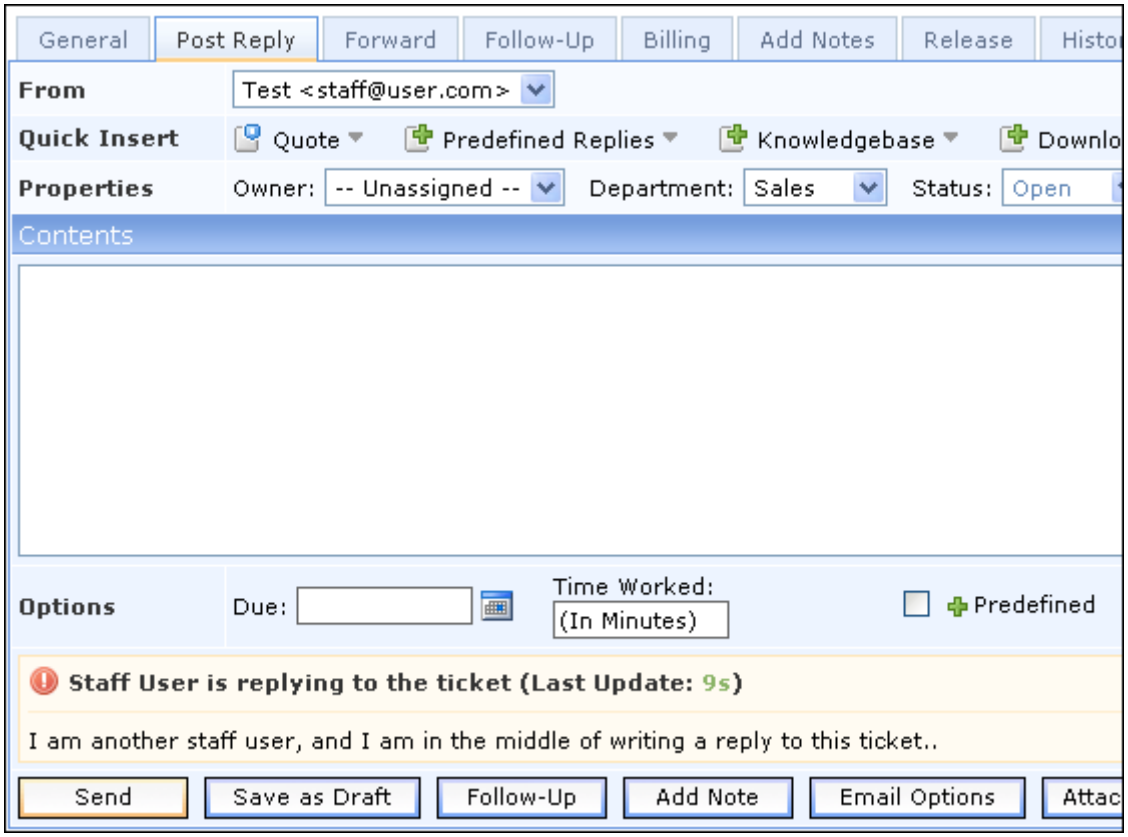
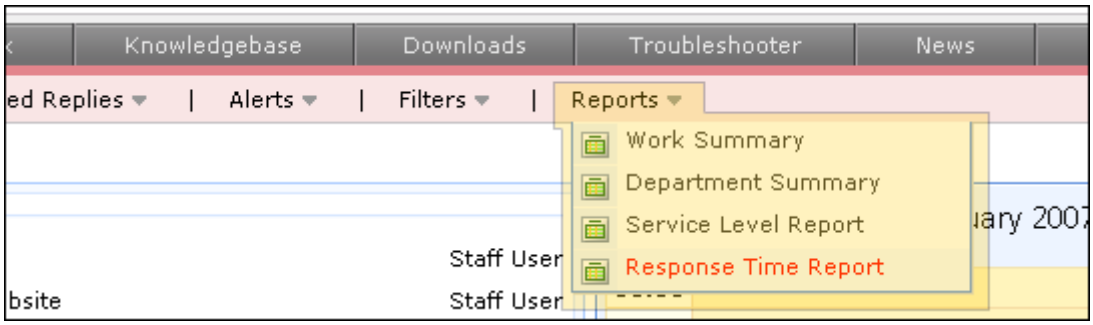


Ticket reports

The **ticket reports** system features a series of ticket and service related reports to give service level, response time and work level reports across a period of time, a list of staff users and/or a list of departments.

To access the ticket reports menu:

1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **Reports** sub-menu.
3. Select a **Report**.

Work summary

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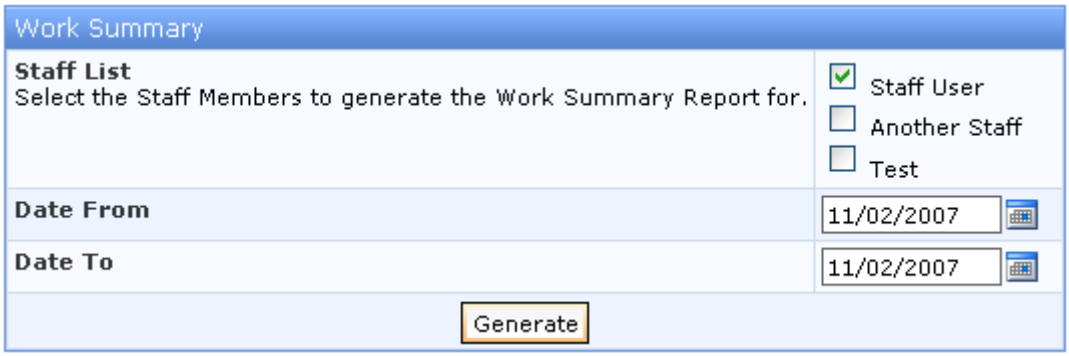
The **work summary** report gives a day-by-day and hour-by-hour work summary for one or more staff users during a period of time.



- **Staff List** – the staff members for which you wish to generate the work summary report.
- **Date From** – the date from which you wish to generate the report.
- **Date To** – the end date to which you wish to generate the report.

Click on the **Generate** button to generate the report.

A part of a work summary report is shown below.

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Staff User: Thursday, 01 February 2007	
00:00	
01:00	
02:00	
03:00	
04:00	
05:00	
06:00	
07:00	
08:00	
09:00	UZO-924368: Ticket Department Changed From: General To: Sales
	UZO-924368: Setting Due Time To: 02 Feb 2007 09:23 AM
	UZO-924368: Ticket Priority Changed From: Emergency To: Critical
	UZO-924368: Ticket Due Time Set To: 19 Jan 2007 12:00 AM By: Staff User
	UZO-924368: Setting Due Time To: 02 Feb 2007 09:58 AM
10:00	UZO-924368: Ticket Printed By: Staff User
	UZO-924368: SLA Plan Set To: Example SLA Plan
	UZO-924368: Setting Due Time To: 12 Feb 2007 02:10 PM
11:00	
12:00	
13:00	UZO-924368: Ticket Status Changed From: Open To: On Hold
	UZO-924368: SLA Plan Set To: Example SLA Plan
	UZO-924368: Setting Due Time To: 12 Feb 2007 05:27 PM
	IDS-780953: Ticket Status Changed From: On Hold To: Open
	IDS-780953: Setting Due Time To: 02 Feb 2007 01:58 PM
14:00	
15:00	
16:00	IDS-780953: Ticket Flagged To: Yellow Flag By: Staff User
	UZO-924368: Ticket Printed By: Staff User
	UZO-924368: Ticket Exported as PDF By: Staff User

Department summary

The **department summary** report gives an overview of ticket activity across a department. It is possible to filter the views by date, staff user and by department.

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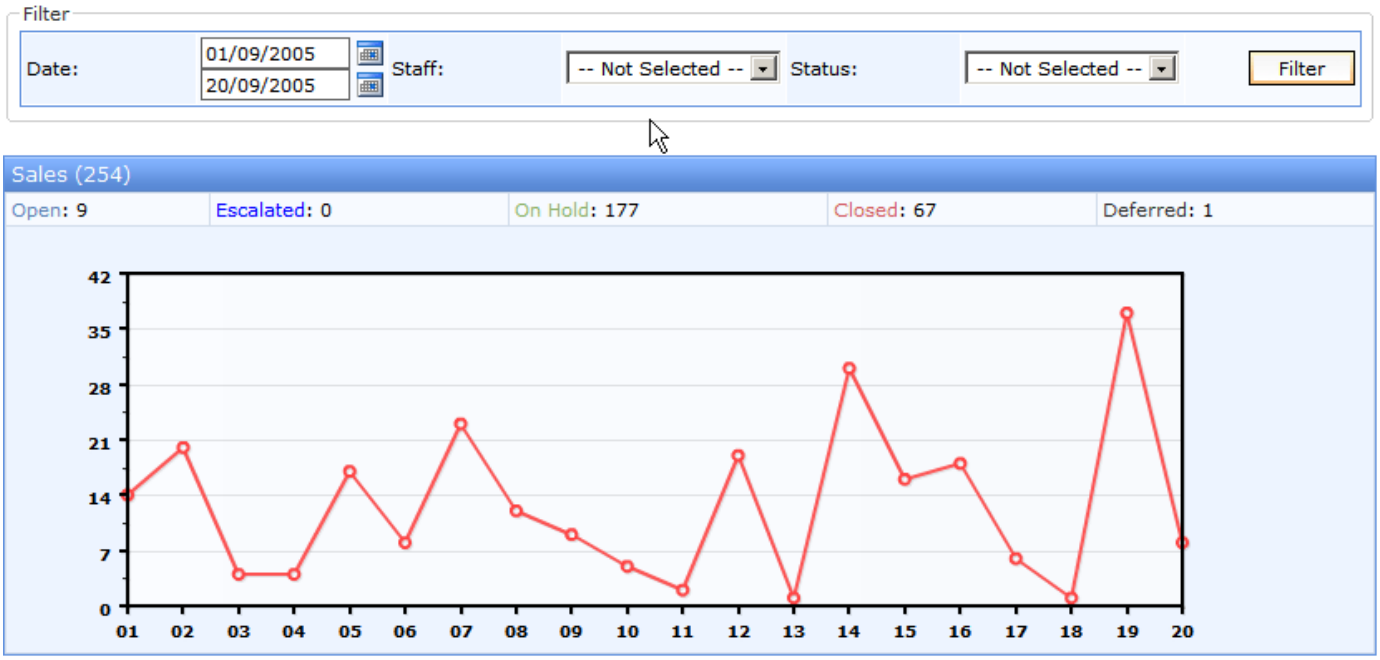
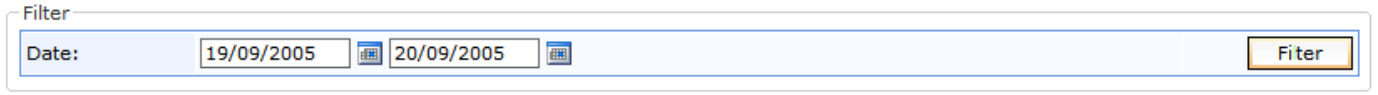


Service level report

The **service level** report gives an overview of tickets that are meeting and that are not meeting their respective SLA plan targets. The service level report can be generated to give an overview of target meeting across a specific period of time.



Ticket ID	Subject	Department	Status	Priority	Staff Worked	SLA Timeline
	STATUS: FuturePay Callback Succeeded	Services	Closed	Low		- NOT REPLIED -
	STATUS: FuturePay Callback Succeeded	Services	Closed	Low		- NOT REPLIED -
	WorldPay credit/debit card purchase:	Receipts	Closed	Low		- NOT REPLIED -
	WorldPay credit/debit card purchase:	Receipts	Closed	Low		- NOT REPLIED -
	URGENT: FuturePay Callback Failed	Services	Deferred	Low		- NOT REPLIED -
	WorldPay credit/debit card purchase:	Receipts	Closed	Low		- NOT REPLIED -
	URGENT: FuturePay Callback Failed	Support	Closed	Low	Hiren Mehta	100.00%
	STATUS: FuturePay Callback Succeeded	Services	Closed	Low		- NOT REPLIED -
	STATUS: FuturePay					

Response time report

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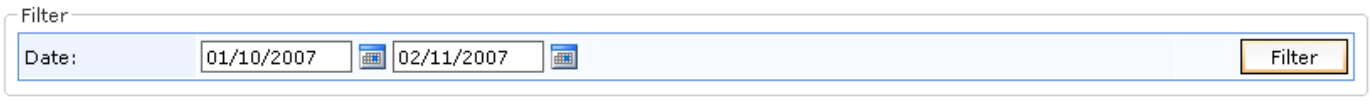
The **response time** report gives an overview of tickets received within a specified period of time, giving their average response times, time worked and time to resolution among other information, as shown below.



Ticket ID	Subject	Date	Status	Avg Response	Resolution	Time Worked	Staff Worked
IDS-780953	Test	15 Jan 2007 12:35 AM	Open	0s	22d8h20m	0s	Staff User
UZO-924368	About your website	18 Jan 2007 01:22 PM	Open	11d16h41m	18d5h11m	0s	Staff User
YRT-584563	Another ticket from me	07 Feb 2007 09:46 PM	Open	22h53m4s	22h53m4s	0s	Staff User

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Users and groups

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Groups

A **user group** is a grouping that is created, to which **user accounts** can be added. A single user account can be added to only one user group.

A user group has the following properties:

- Group name
- A group type
- Assigned SLA plan
- Client support interface permissions

User groups are a useful way of giving a scope of user account's certain permissions, certain SLA plans and ultimately certain levels of support.

A **registered** user group includes **any** user that is logged into the client support interface.

A **guest** user group includes any user browsing the client support interface that are **not** logged into the system.

Example use of user groups

You have ten user accounts and wish for all of them to be able to view the Troubleshooter widget on the front page of the support desk. You also want all tickets from these users to adhere to SLA Plan A. Assigning these properties ten times over is tedious.

Instead, you may wish to create a **user group** that has these properties and add the ten user accounts to the user group. The accounts will then **inherit** the properties set for this new user group.

You may also wish that a **guest** using one of your template groups (as a satellite support desk for a different company of yours) is not able to view the **Download** widget on the client support interface. In this case, you would great a new user group of type **guest**, and use this user group as the **Guest Group** for the other template group.

Registered vs. Guest user groups

- A **registered** user group includes any user that is logged into the client support interface.
- A **guest** user group includes those browsing the client support interface, that are not registered or logged into the system.

Managing user groups

To manage user groups:

1. Open **Users** on the navigation menu bar, as shown below.

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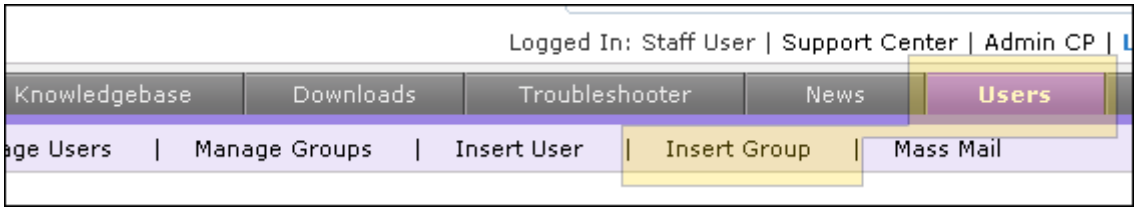
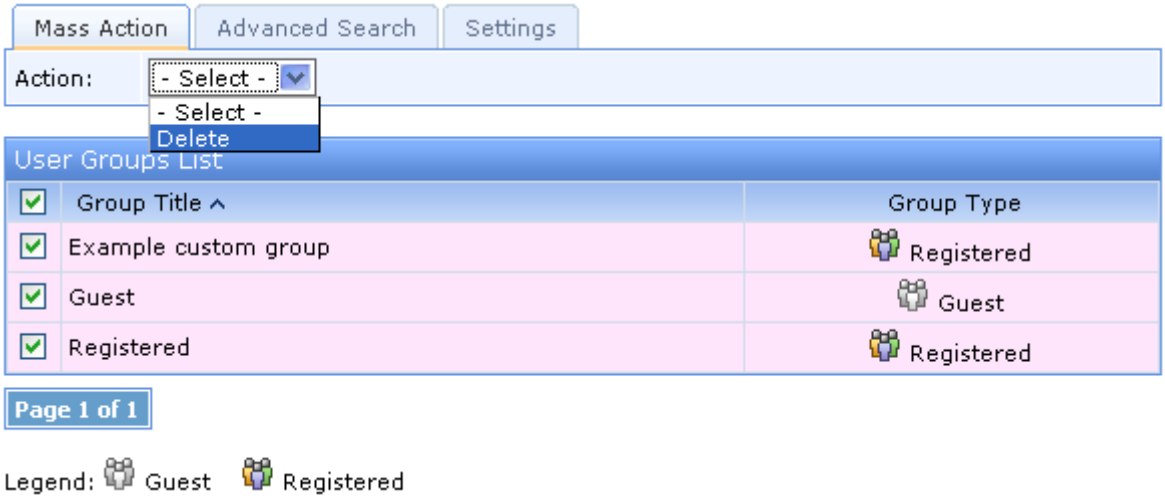


2. Click on **Manage Groups**.

You will be presented with a list of user groups currently configured for the SupportSuite installation.

Clicking on the name of a user group will take you to a form of editable properties for the respective group. Refer to user group fields for documentation on the required fields for new user group.

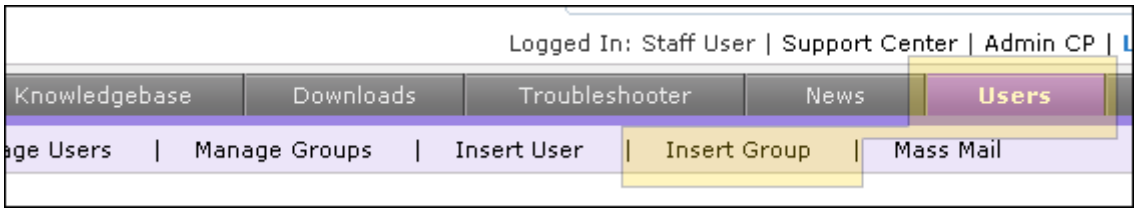


Selecting multiple user groups (by checking the corresponding check boxes, as shown above) will open the **mass-management menu**, as shown below. Using this menu, groups can be mass-deleted. Under the **Advanced Search** tab, groups can be searched for. Under the **Settings** tab, the number of groups shown per page (if there are many) can be limited.

Creating a new user group

To create a new user group:

1. Open **Users** on the navigation menu bar, as shown below.



2. Click on **Insert Group**.

Refer to user group fields for documentation on the required fields for a new user group.

User group fields

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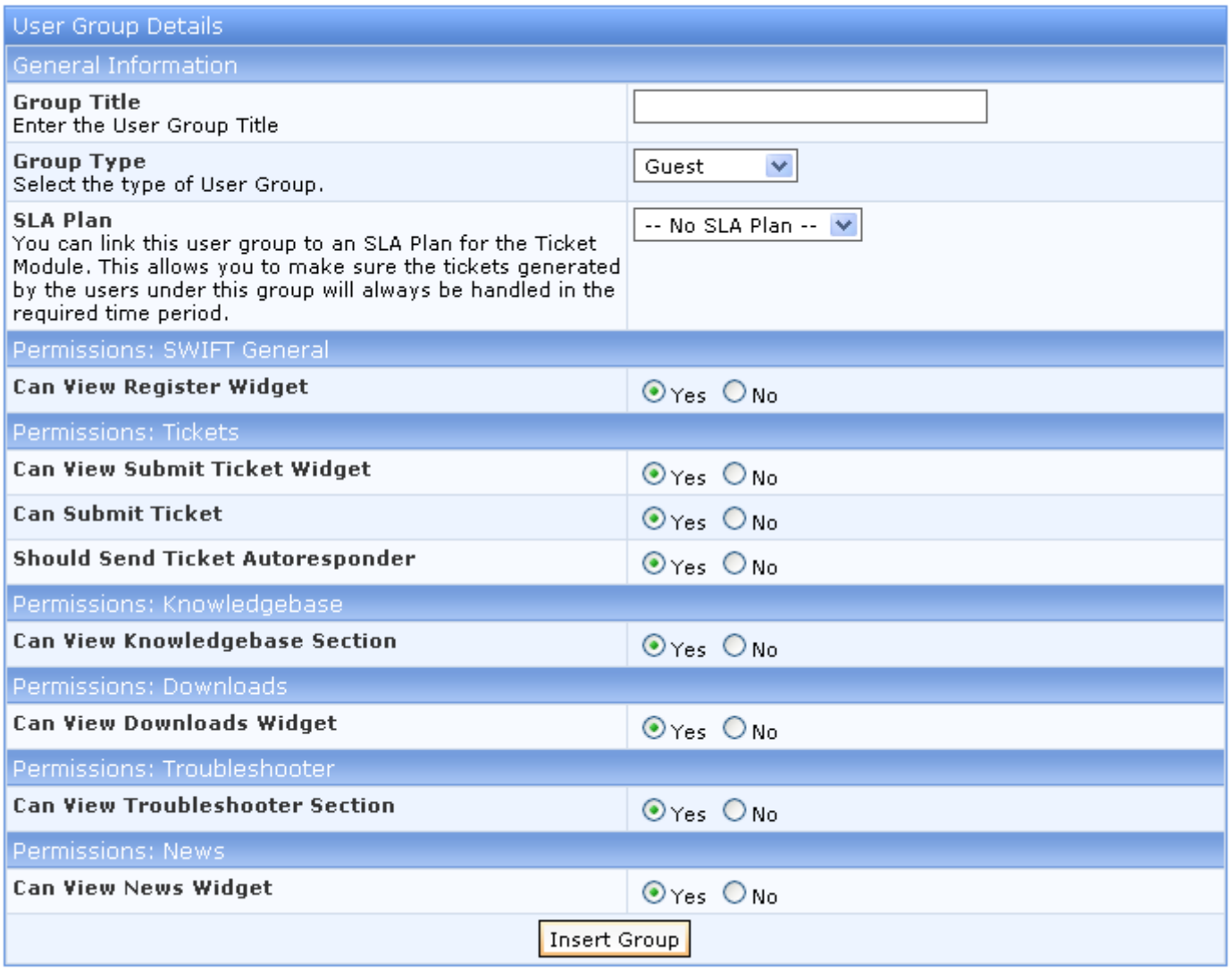

General Information

- **Group title** – the name of the group – such as "Hosting Customers".
- **Group type** – has two options; registered and guest. For more information on group types, see Registered vs. Guest user groups.
- **SLA plan** – allows for selection of an SLA plan that all users who are member to this user group will inherit.

Permissions: SWIFT General

- **Can View Register Widget** – if set to no, users of this group will not be able to view the "Register" widget on the support desk home page (see what is a widget in the frequently asked questions).

Permissions: Tickets

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- **Can View Submit Ticket Widget** – if set to no, users of this group will not be able to view the "Submit a Ticket" widget on the support desk home page.
- **Can Submit Ticket**– if set to no, users of this group will not be able to submit tickets to the support desk.
- **Should Send Ticket Autoresponder** – if set to no, no auto-responder confirming receipt of their message will be sent to the user upon ticket creation.

Permissions: Knowledgebase

- **Can View Knowledgebase Section** – if set to no, users of this group will not be able to view the knowledgebase.

Permissions: Downloads

- **Can View Downloads Widget** – if set to no, users of this group will not be able to view the "Downloads" widget on the support desk home page.

Permissions: Troubleshooter

- **Can View Troubleshooter Section** – if set to no, users of this group will not be able to view the troubleshooter.

Permissions: News

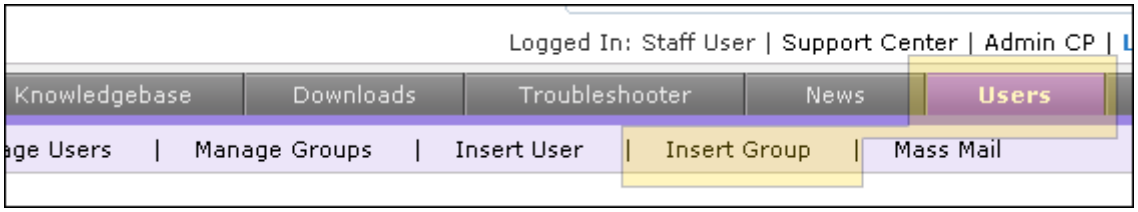
- **Can View News Widget** – if set to no, users of this group will not be able to view the "News" widget on the support desk home page.

Searching for tickets by user group

Tickets can be quickly searched for by group, directly from within the group management areas.

To view a user group:

1. Open **Users** on the navigation menu bar, as shown below.



2. Click on **Manage Groups**.
3. Click on the name of a **User Group**.

On the right hand side of your interface, note the **Group Options** menu. From here, you are about to search for tickets by the user group currently in view (and by status), as shown below.

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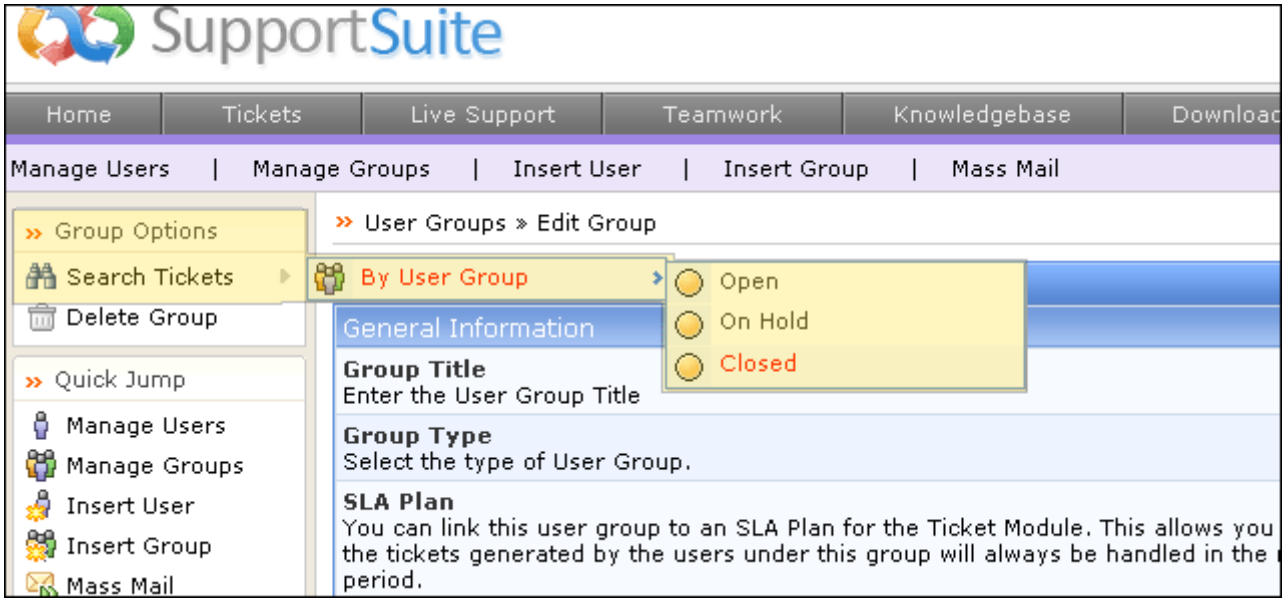

Tickets can also be searched for using the advanced search tool.

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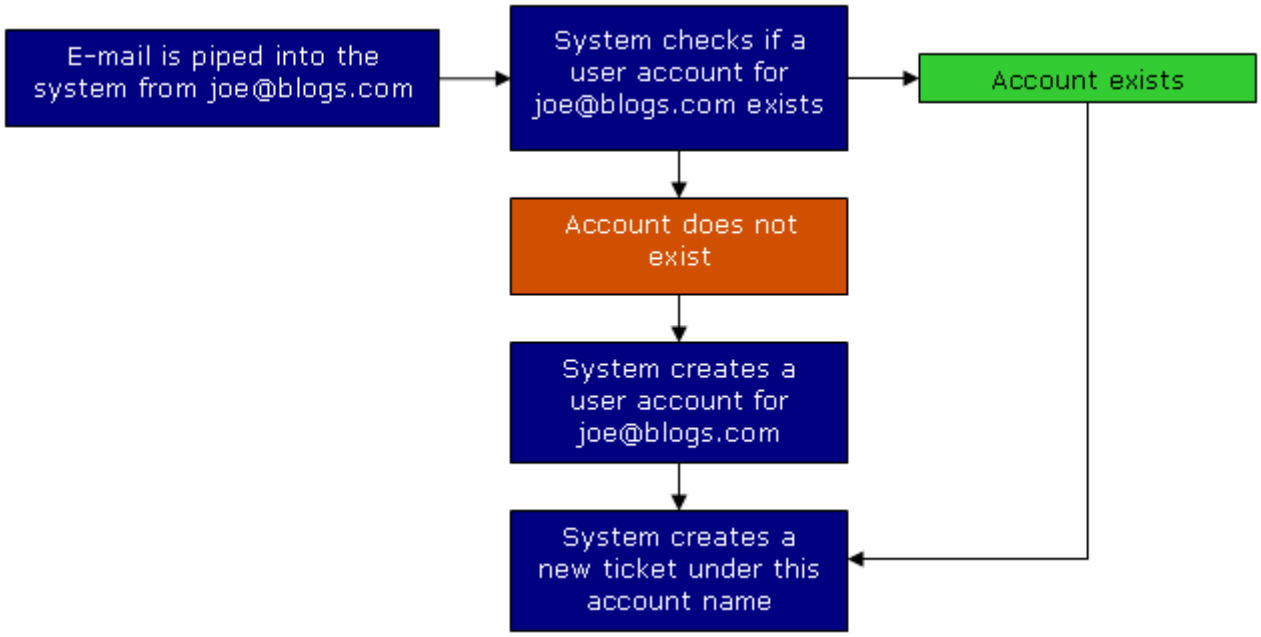
Users

A **user account** is associated to and indexed by one or more e-mail addresses.

Depending on the configuration of your SupportSuite installation, visitors to your support desk can manually register themselves and create a user account using an e-mail address. Staff users will also be able to manually create user accounts from the staff control panel.

If your installation of SupportSuite has been configured to accept **piped e-mail messages** into your support desk, and a ticket is created from an e-mail address that has no **associated user account**, the system will automatically create a user account for this 'user'; using any information it can find from the initial e-mail.


E-mail is piped into the system from joe@blogs.com
System checks if a user account for joe@blogs.com exists
Account exists
Account does not exist
System creates a user account for joe@blogs.com
System creates a new ticket under this account name

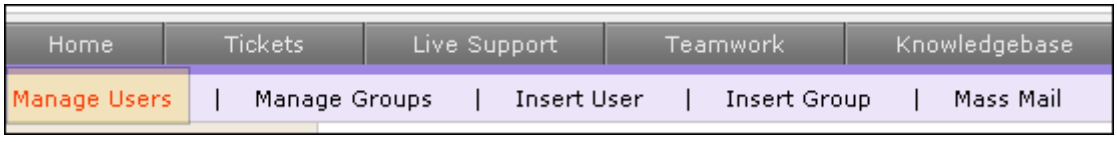
In summary, no ticket will come into the support desk (either by form submission or by e-mail piping) without having a user account created for the e-mail address that the ticket came from. Every ticket belongs to a user account.

Staff users are able to enter more information for automatically created user accounts at a later stage (such as a real name, contact telephone number etc), as well as having the ability to **delete user accounts** – all depending on the staff user's permissions for using the staff control panel.

Managing user accounts

To manage user accounts:

1. Open **Users** on the navigation menu bar, as shown below.



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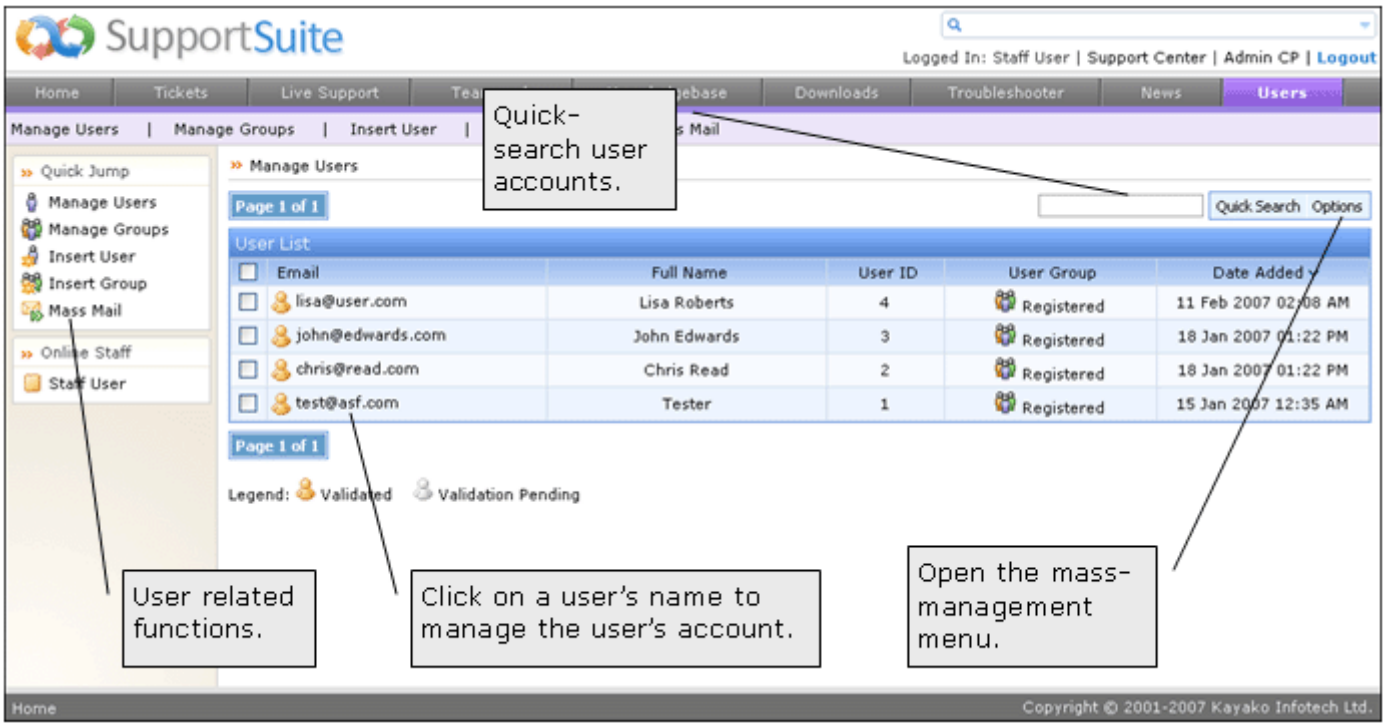
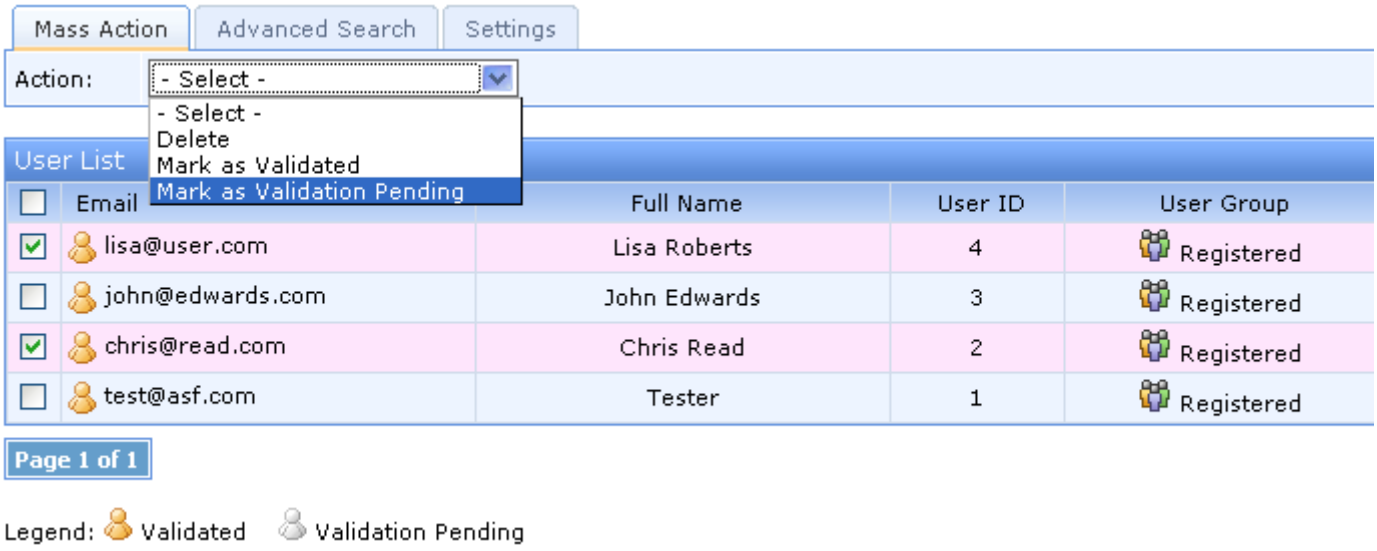
2. Click on **Manage Users**.

You will be presented with a list of user accounts registered within the system, as shown below. Clicking on the **e-mail address** of a user will take you to the **account view** of the respective user.



Selecting one or more user accounts be checking the corresponding check boxes (as shown below), will open the **mass-management menu**.



The **Advanced Search** tab (as shown below) allows you to filter the list of user accounts according to certain user account properties. The **Settings** tab (as shown below) allows you to specify how many user accounts are listed per page.

When viewing a user account, you will be presented with an interface similar to that shown below.

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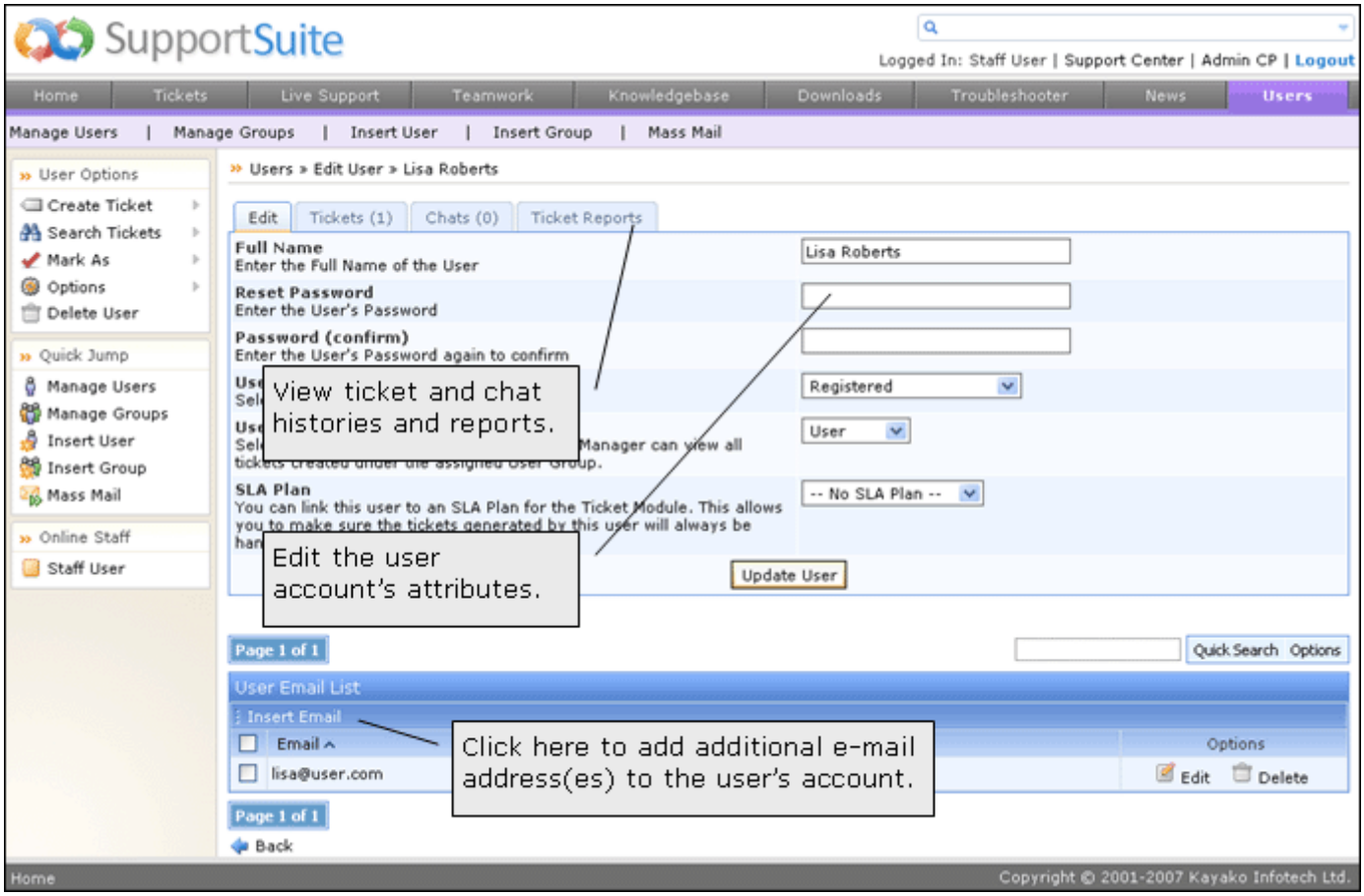
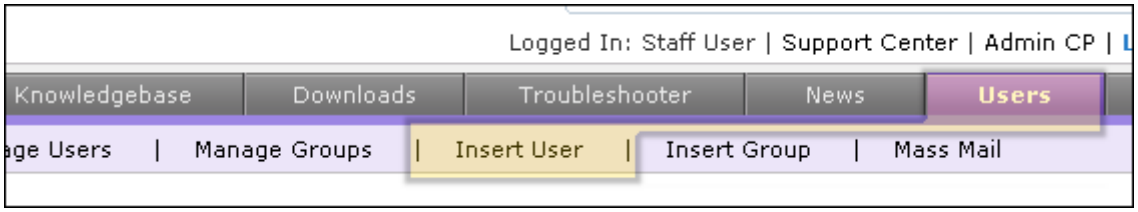


Refer to user account fields for documentation on the required fields for a new user account.

Creating a new user account

To create a new user account:

1. Open **Users** on the navigation menu bar, as shown below.


Logged In: Staff User | Support Center | Admin CP |
Knowledgebase
Downloads
Troubleshooter
News
Users
Manage Users | Manage Groups | Insert User | Insert Group | Mass Mail

2. Click on **Insert User**.

Refer to user account fields for documentation on the required fields for a new user account.

User account fields

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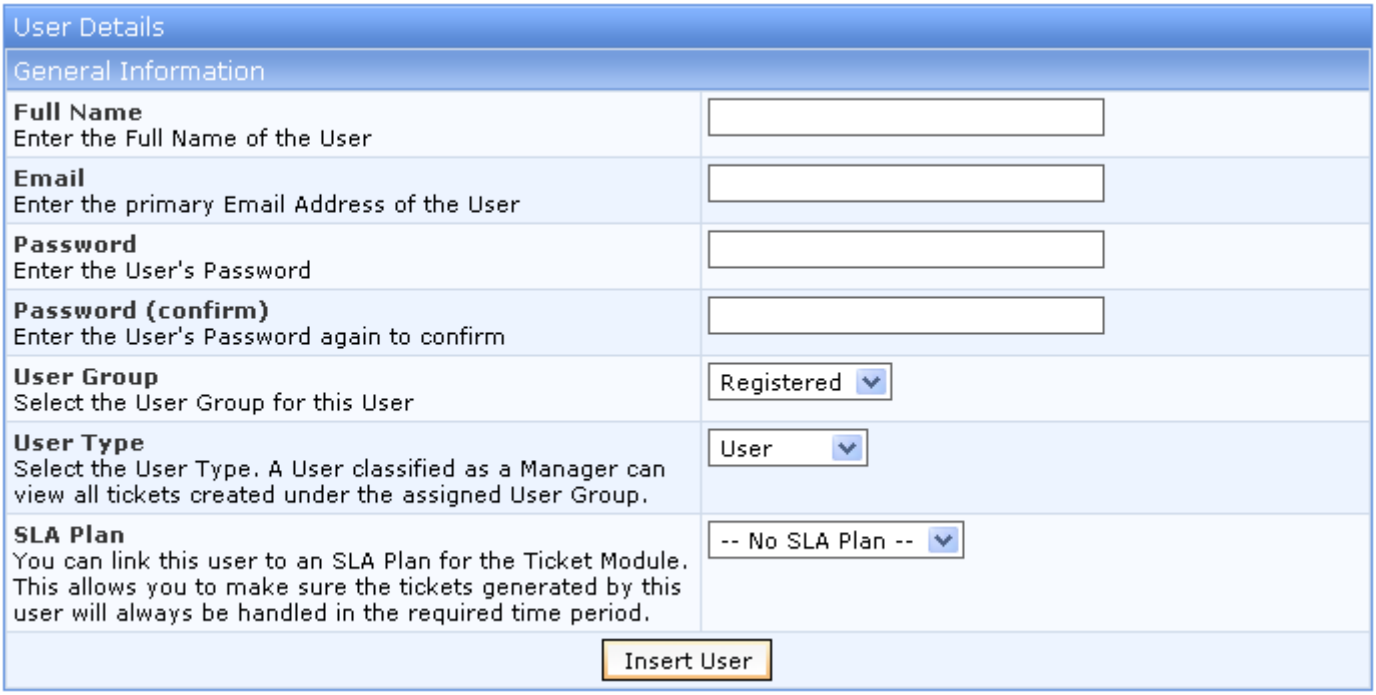
User Details
General Information
Full Name
Enter the Full Name of the User
Email
Enter the primary Email Address of the User
Password
Enter the User's Password
Password (confirm)
Enter the User's Password again to confirm
User Group
Select the User Group for this User
Registered
User Type
Select the User Type. A User classified as a Manager can view all tickets created under the assigned User Group.
User
SLA Plan
You can link this user to an SLA Plan for the Ticket Module. This allows you to make sure the tickets generated by this user will always be handled in the required time period.
-- No SLA Plan --
Insert User

General Information

- **Full Name** – the full name of the user. This name will appear on all ticket replies made by the user.
- **Email** – the primary e-mail address of the user. All tickets and replies coming from this e-mail address will be associated with this user's account. This is also the e-mail address the user will log into the **client support interface**. More e-mail addresses can be added to a user account after creation.
- **Password** – the password for this user account.
- **User Group** – the user group in which the user's account will belong. For more information on user groups, see groups.
- **User Type** – a user can either be a **User** or a **Manager**. A **User** account acts as an individual, private user. A **Manager** account will be able to view all tickets created by users that are member of the user group set above this field.
- **SLA Plan** – a specific SLA plan can be assigned to a user's account by selecting one here. If no SLA plan is selected, the system default (if set) SLA plan will be adhered to for this user's tickets.

Deleting a user account

To delete a user account:

1. Open **Users** on the navigation menu bar, as shown below.

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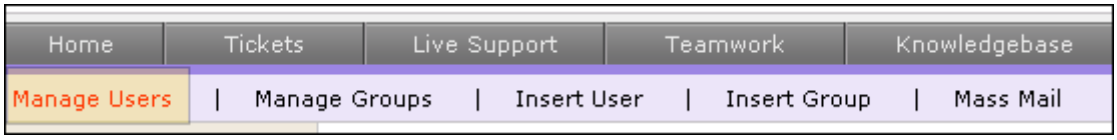
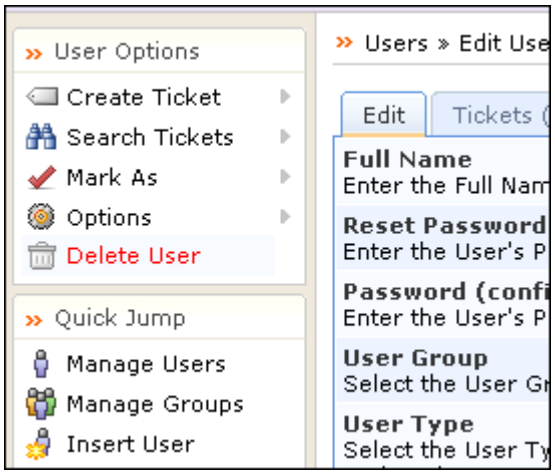


2. Click on **Manage Users**.

You will be presented with a list of user accounts registered within the system, as shown below. Click on a user's **e-mail address** to view the user's account.

From within the **User Options** menu (as shown below), click on **Delete User.**

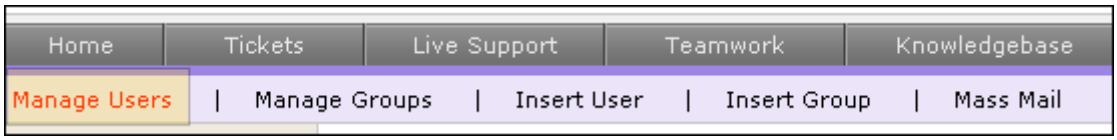


Validating a user account

When a user registers an account via the **client support interface**, the account remains **inactive** until the user validates their account be e-mail (configurable within the **administrator control panel**).

To validate (or deactivate) a user account:

1. Open **Users** on the navigation menu bar, as shown below.



2. Click on **Manage Users**.

You will be presented with a list of user accounts registered within the system, as shown below.

Select the user(s) you wish to validate by checking the corresponding check boxes, as shown below. Doing this will open the **mass-management menu**, as shown below. From this menu, you are able to validate, deactivate and delete users.

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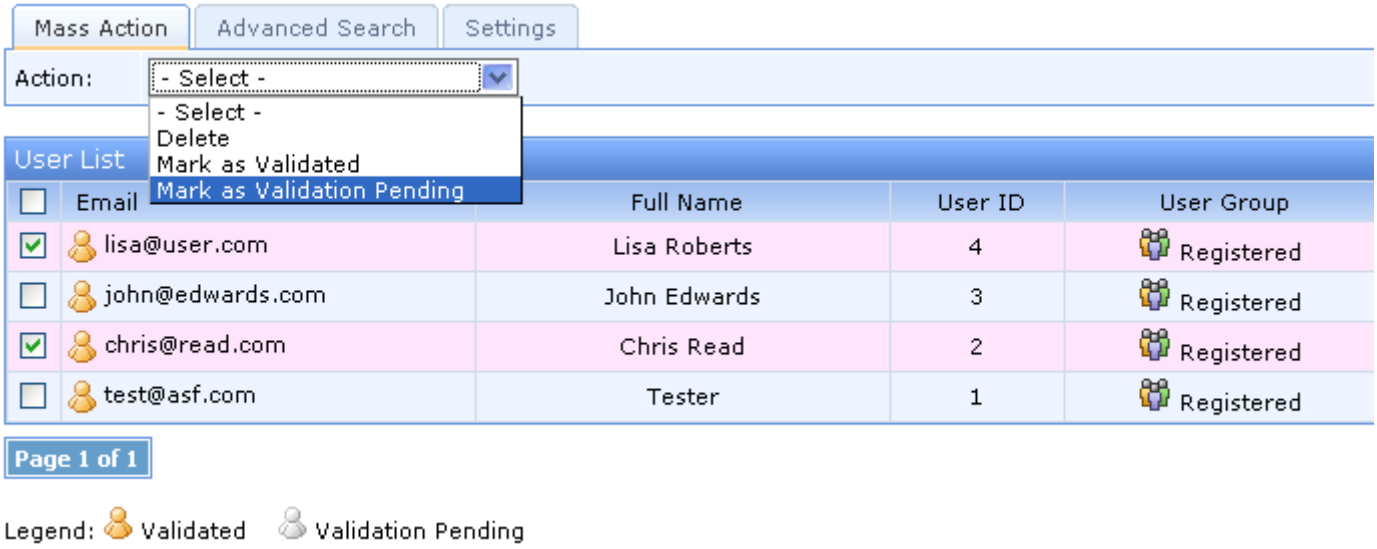
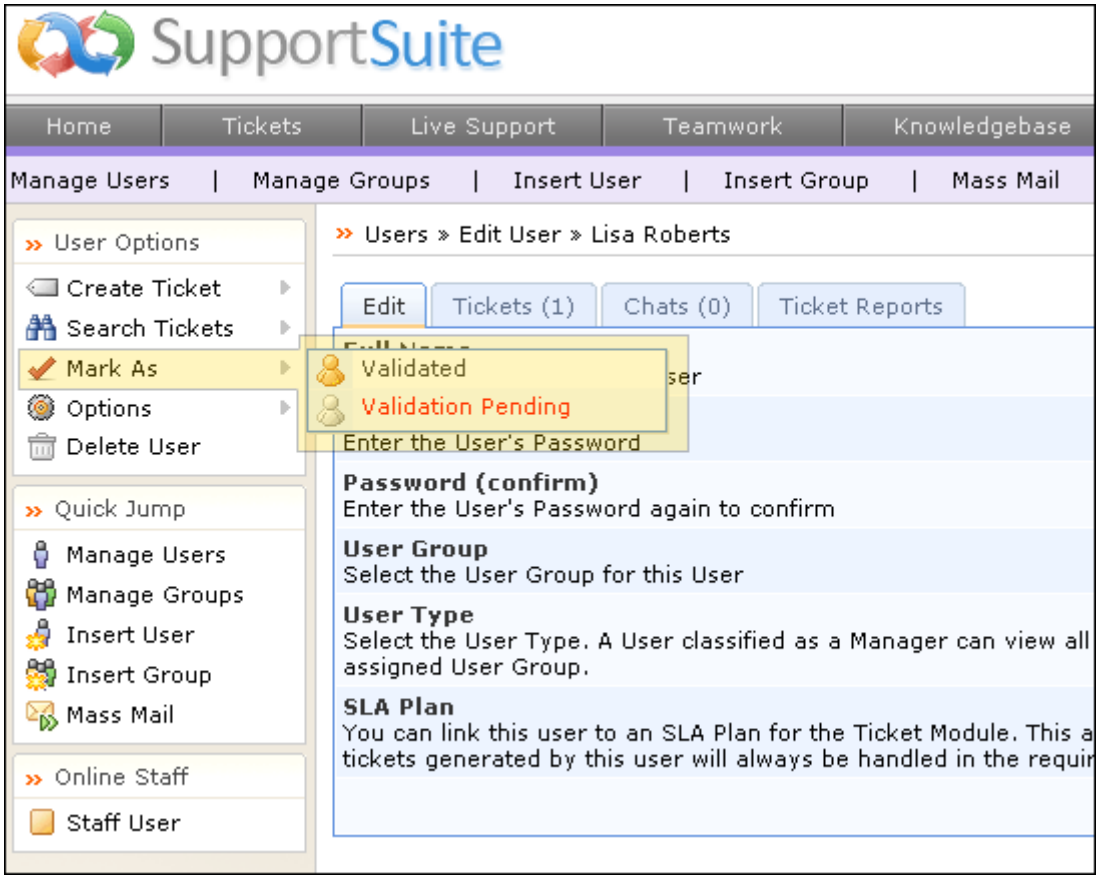


A user's account can also be validated and deactivated when viewing an account. To view an account, click on the user's **e-mail address** from the **manage users** list (as shown above).

Under the **user options** menu, as shown below:

1. Open the **Mark As** menu.
2. Click on **Validated** to validate the account or **Validation Pending** to deactivate the user's account.



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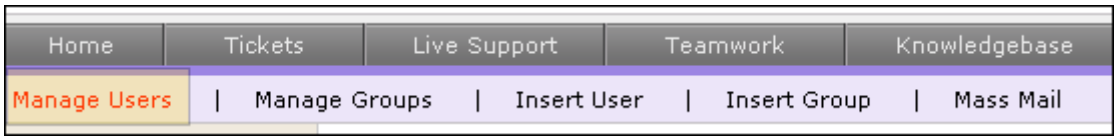
Resending a registration e-mail

To resend a user's registration e-mail (containing their e-mail address and **ticket key** (password)):

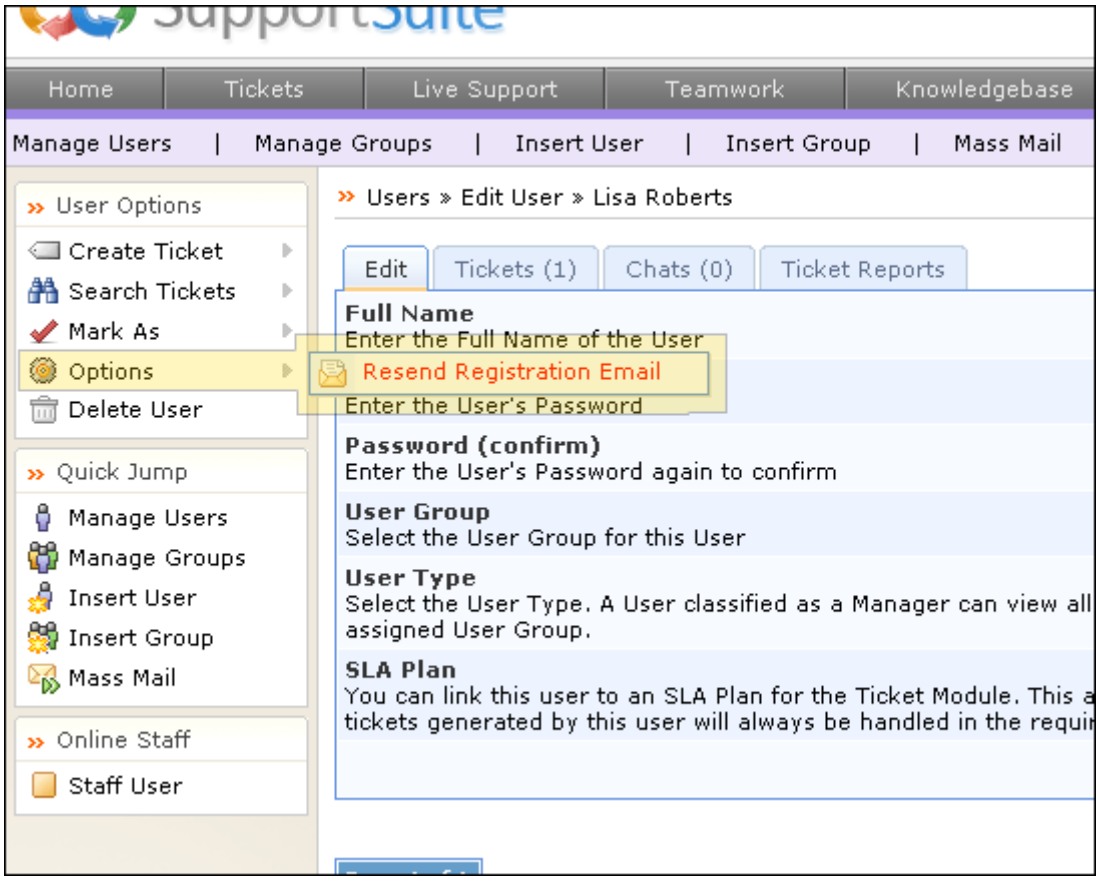
1. Open **Users** on the navigation menu bar, as shown below.



2. Click on **Manage Users**.

You will be presented with a list of user accounts registered within the system, as shown below. Click on a user's **e-mail address** to view the user's account.

From within the **Options** menu (as shown below), click on **Resend Registration Email**.



Assigning more e-mail addresses to a user account

You may require that a user has one or more e-mail addresses associated with his or her user account on your eSupport or Support Suite installation.

If a user account had an additional e-mail address *user@hello.com*, any new ticket or ticket reply raised from this e-mail address will be automatically associated to the user's account.

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Adding additional e-mail addresses to a user's account is detailed in viewing and managing user accounts.

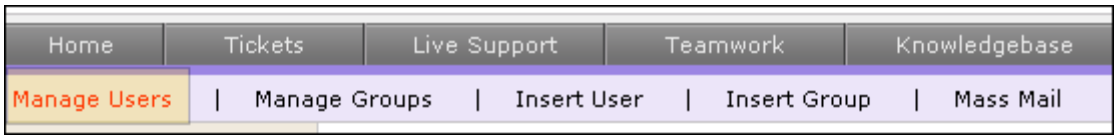
Assigning an SLA plan to a user

SLA plans can be set up to automatically apply to a department (and/or a set of statuses, priorities and so on) – see SLA in the administrator control panel..

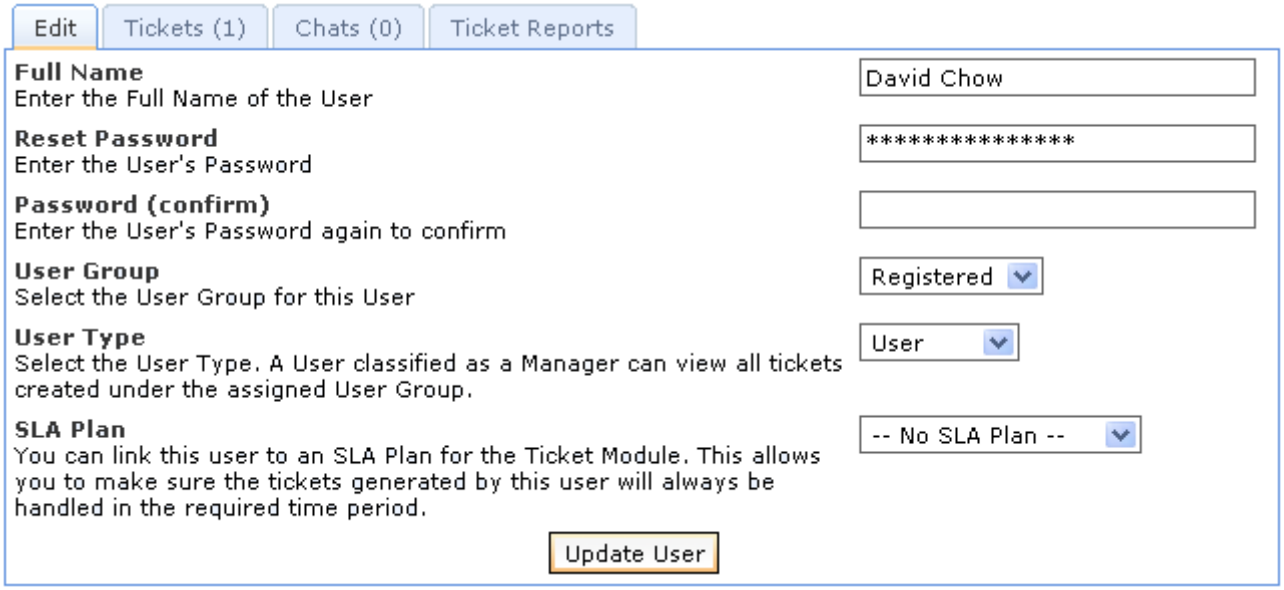
SLA plans can also be assigned to tickets that match certain rules in the mail parser (see mail parser in the administrator control panel).

To assign a user to an SLA plan:

1. Open **Users** on the navigation menu bar, as shown below.



2. Click on **Manage Users**.
3. Click on the **Edit** tab.


Edit
Tickets (1)
Chats (0)
Ticket Reports
Full Name
Enter the Full Name of the User
David Chow
Reset Password
Enter the User's Password
Password (confirm)
Enter the User's Password again to confirm
User Group
Select the User Group for this User
Registered
User Type
Select the User Type. A User classified as a Manager can view all tickets created under the assigned User Group.
User
SLA Plan
You can link this user to an SLA Plan for the Ticket Module. This allows you to make sure the tickets generated by this user will always be handled in the required time period.
-- No SLA Plan --
Update User

4. Under **SLA Plan**, select the required SLA plan to assign to this user's account.
5. Click on the **Update User** button.

All tickets created under this user's account will be assigned to the SLA plan here, overriding and department-wide SLA plans configured in the administrator control panel.

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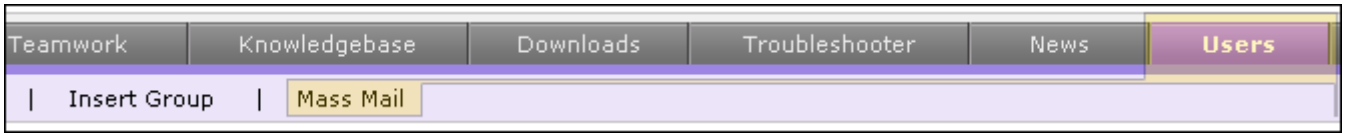
Mass mailing users

To mass-mail users:

1. Open **Users** on the navigation menu bar, as shown below.



2. Click on **Mass Mail**.

You will be presented with the **mass-reply** interface, as shown below.

Mass Mail
Mail Subject
From Name
This is the default name that is used for the "From" field in the outgoing Email.
Staff User
From Email
This Email Address is used as the "From" and "Reply-To" fields in the outgoing Email.
staff@user.com
User Groups
Select the User Groups to send the mass mail to. Only the Users assigned to the specified User Groups will receive the mass mail.
Example custom group
Guest
Registered
Mail Contents
Send Mail

- **Mail Subject** – the **subject line** of the e-mail being sent out.
- **From Name** – the **from name** that will be displayed on the e-mail being sent out.
- **From Email** – the **from e-mail** address that will be used as the "From" and "Reply-to" fields for the e-mail being sent out.
- **User Groups** – to which **user groups** the e-mail will be sent to.

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- **Mail Contents** – the **e-mail body** of the e-mail being sent out.

Click on the **Send Mail** button to send the e-mail.

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Live support

The **Live Support** module and area of the staff control panel is available only in SupportSuite and Live Response installations. For more information on Kayako's different products, see the introduction.

From the Live Support area, staff members can review message histories, chat histories, manage advert tracking campaigns, manage canned messages and generate live support tags.

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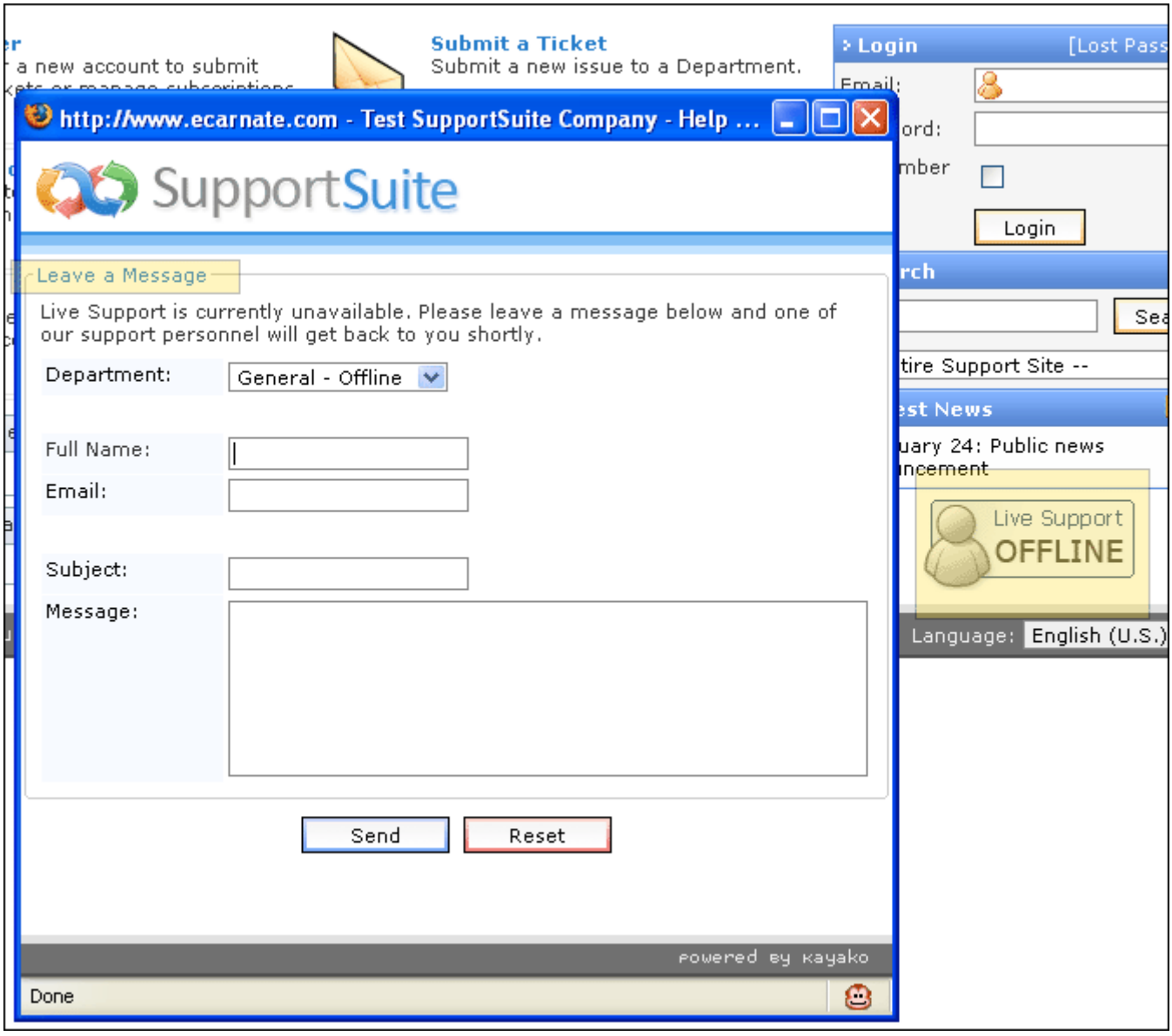
Messages

Messages are left by users when live support is **unavailable**. For example, if no staff user is logged into the LiveResponse application or if all staff users are busy.

As shown below, the user will be presented with a **Leave a Message** form if live support is unavailable.



Viewing and replying to messages left by users

To view messages left by users:

1. Open **Live Support** on the navigation menu bar, as shown below.

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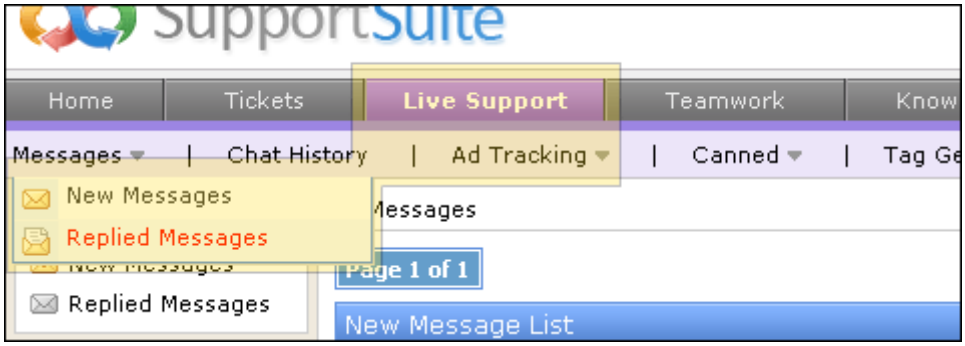

2. Open the **Messages** sub-menu.

3. Click on either **New Messages** to view messages that have not been replied to by a staff member, or click on **Replied Messages** to view messages that have already been replied to by a staff member.

The **New Messages** list is shown below.

To **delete** a message, click on the corresponding delete icon.

Selecting multiple messages (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, messages can be mass-deleted and marked as replied to. Under the **Advanced Search** tab, messages can be searched for by name, subject, content or e-mail address. Under the **Settings** tab, the number of messages shown per page (if there are many) can be limited.

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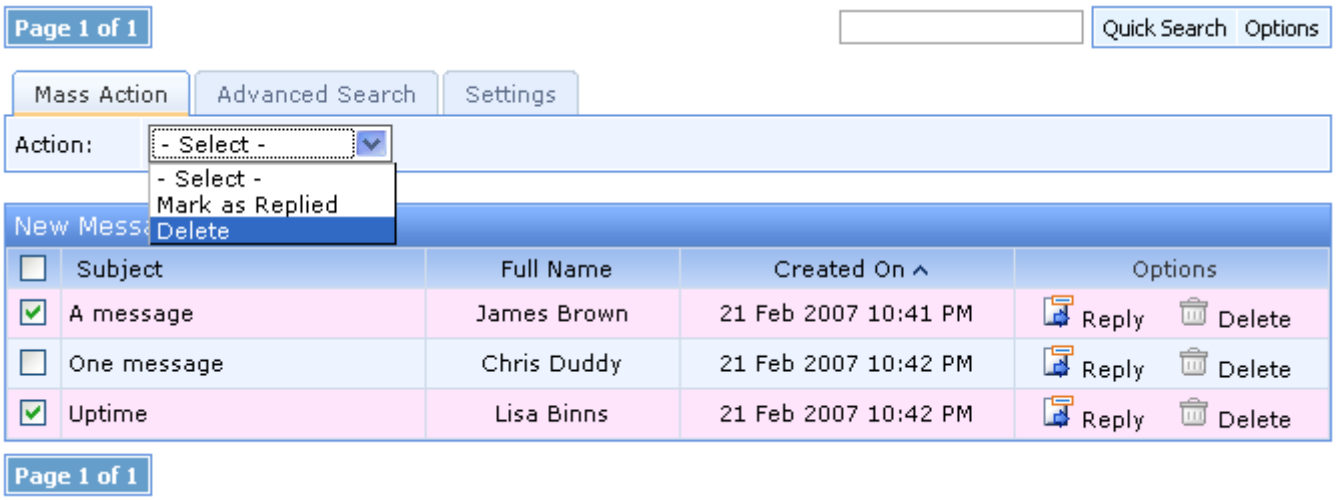
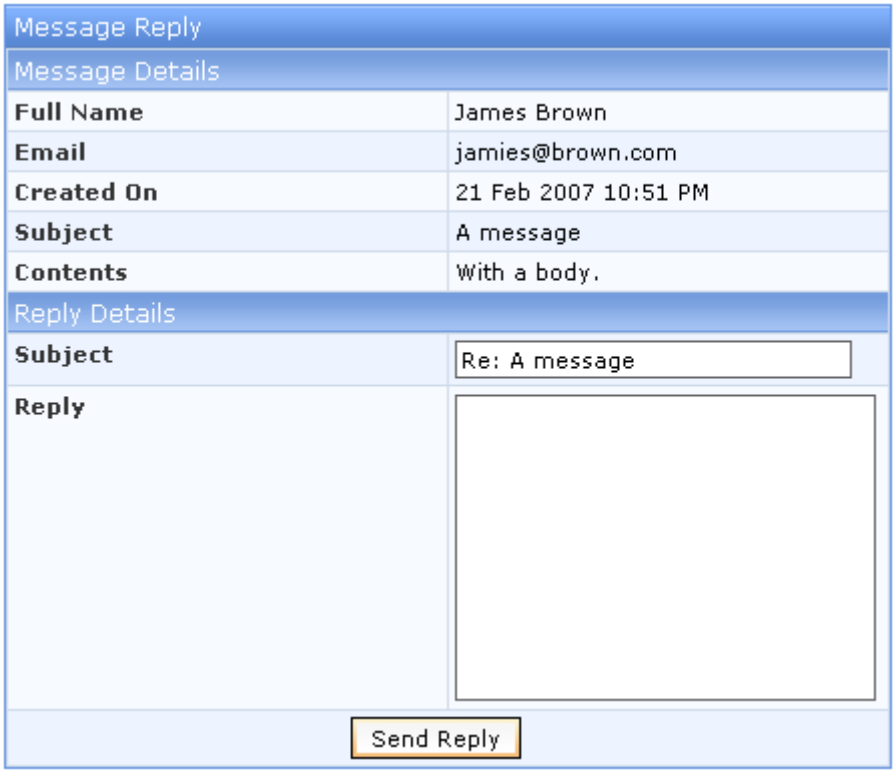


To reply to a message, click on the corresponding reply icon. You will be taken to the message reply interface, as shown below.



To send a reply, fill in the **Subject** and **Reply** fields of the reply form, and click on the **Send Reply** button.

A finished reply example is shown below.

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Message Details	
Full Name	Chris Donner
Email	chris@donner.com
Created On	21 Feb 2007 10:53 PM
Subject	My website
Contents	This is a message I have left you when Live Support was not available.
Reply Details	
Staff Name	Staff User
Replied On	21 Feb 2007 10:53 PM
Reply	This is a staff reply to your message.

Now the message has been replied to, the message will no longer be found under **New Messages**. Instead, it will be listed under **Replied Messages**. Once replied to, a message can no longer be replied to again.

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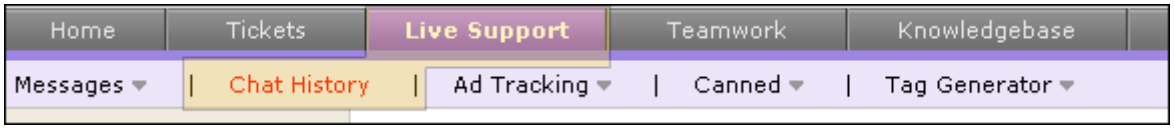
Chat History

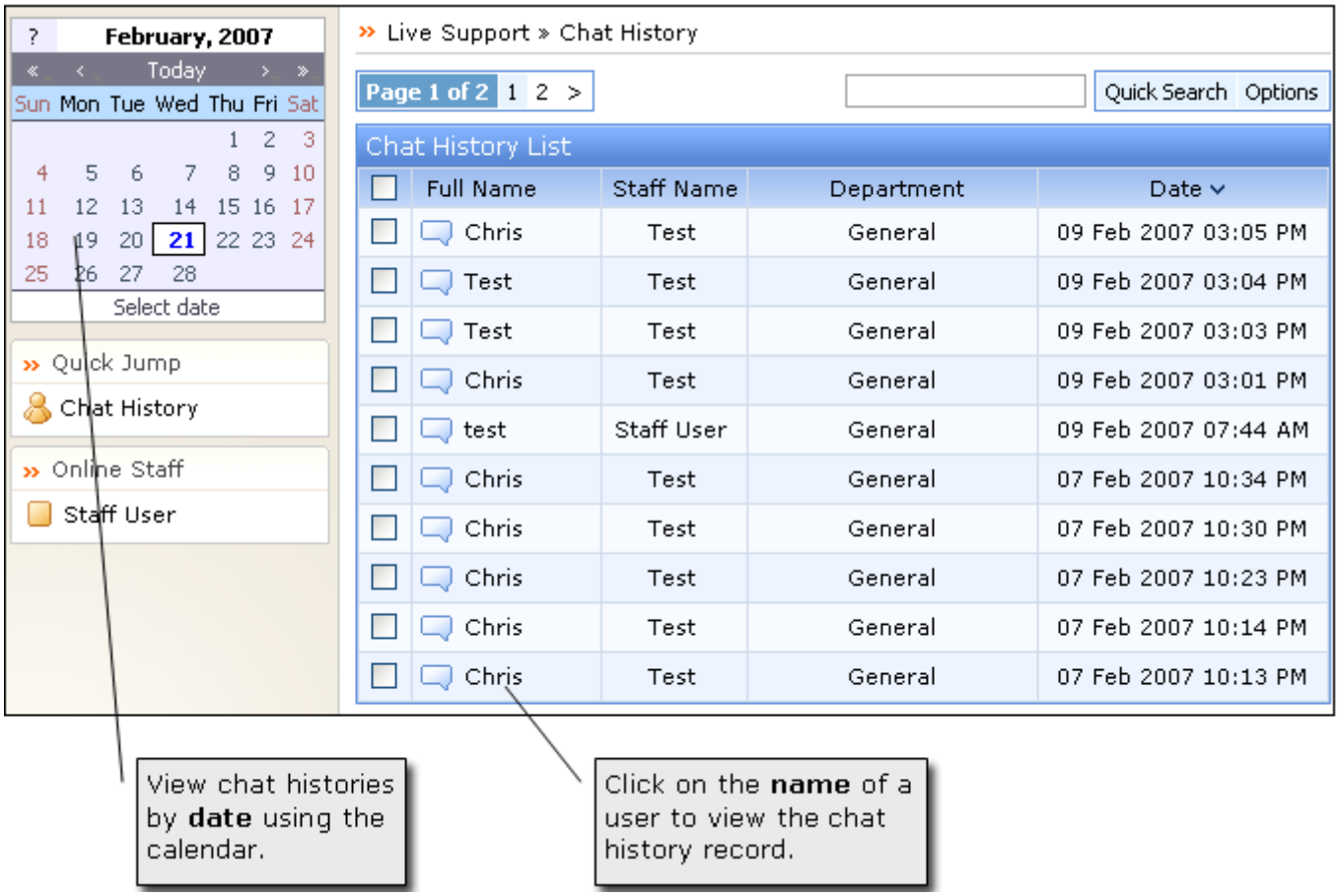
To view the **Chat History** interface:

1. Open **Live Support** on the navigation menu bar, as shown below.



2. Click on **Chat History**.

The chat history interface is shown below.


February, 2007
Today
Sun Mon Tue Wed Thu Fri Sat
Select date
Quick Jump
Chat History
Online Staff
Staff User
Live Support » Chat History
Page 1 of 2 1 2 >
Quick Search
Options
Chat History List
Full Name
Staff Name
Department
Date
Chris Test General 09 Feb 2007 03:05 PM
Test Test General 09 Feb 2007 03:04 PM
Test Test General 09 Feb 2007 03:03 PM
Chris Test General 09 Feb 2007 03:01 PM
test Staff User General 09 Feb 2007 07:44 AM
Chris Test General 07 Feb 2007 10:34 PM
Chris Test General 07 Feb 2007 10:30 PM
Chris Test General 07 Feb 2007 10:23 PM
Chris Test General 07 Feb 2007 10:14 PM
Chris Test General 07 Feb 2007 10:13 PM
View chat histories by **date** using the calendar.
Click on the **name** of a user to view the chat history record.

For details on using the **calendar** to view histories by date, see using the calendar.

Selecting multiple histories (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, histories. Under the **Advanced Search** tab, histories can be searched for by name, chat ID, content or e-mail address. Under the **Settings** tab, the number of histories shown per page (if there are many) can be limited.

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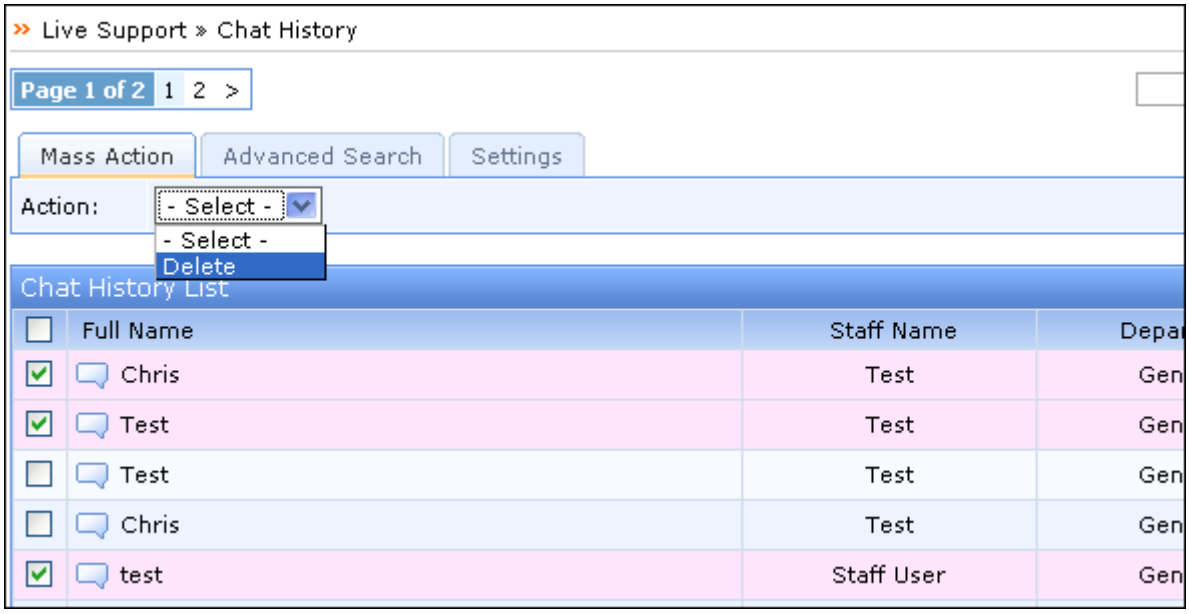
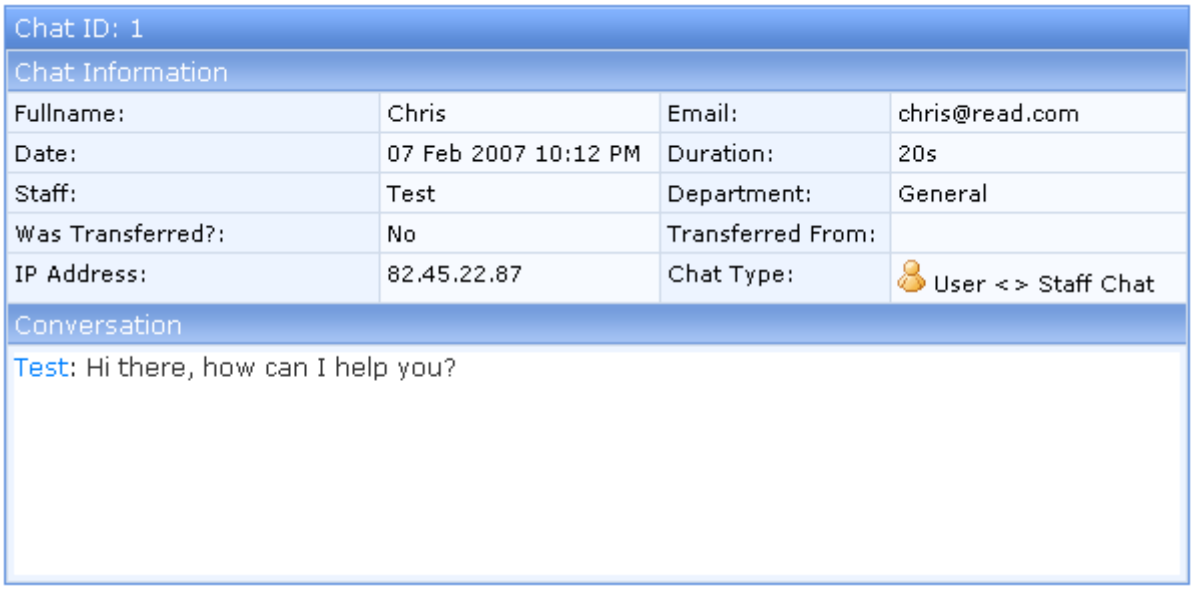


Viewing a chat history

When opening a chat history (by clicking on the **name** of the user), the chat overview will be presented, as shown below.



- **Fullname** – the full name entered by the user.
- **Date** – the date and time the chat was first initiated.
- **Staff** – the staff member who eventually closed the chat.
- **Was Transferred?** – if the chat was transferred to one staff user to another before being closed, this field will display Yes.
- **IP Address** – the IP address of the user.

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- **Email** – the e-mail address of the user.
- **Duration** – the duration of the chat (the time between a chat request being accepted by a staff user and the chat being closed).
- **Department** – the department selected by the user when the chat request was made.
- **Transferred From** – if the chat was transferred, the transferring department/staff user is shown here.
- **Chat Type** – if the user made the chat request, the chat type will be displayed as User<>Staff. If the staff user made the chat request (pre-emptive chat), the chat type will be displayed as Staff<>User.

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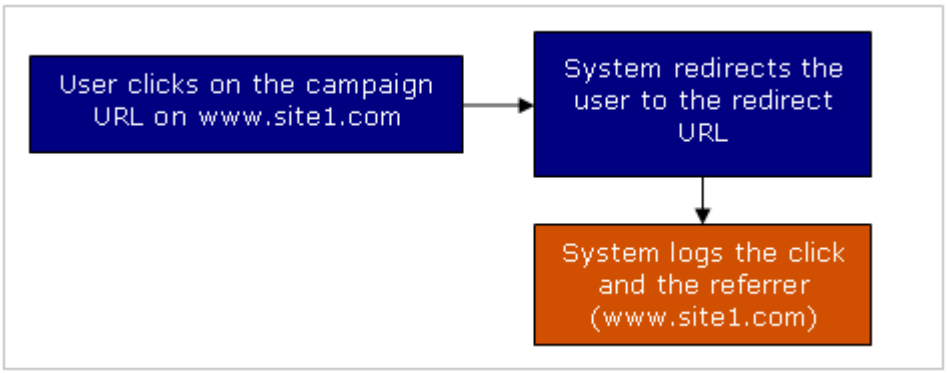
Advert tracking

The **Advert Tracking** functionality of the Live Support area allows for the tracking of referrals and **advert campaigns**.

For example, if you wanted to track referrals to your website's home page, a new **campaign** would be created with the **redirect URL** set to http://www.yourhomepage.com/index.php. A **campaign URL** will then be created by the system (such as *http://www.Yourhomepage.com/support/visitor/index.php?_m=livesupport&_a=track& ampaigned=1*).

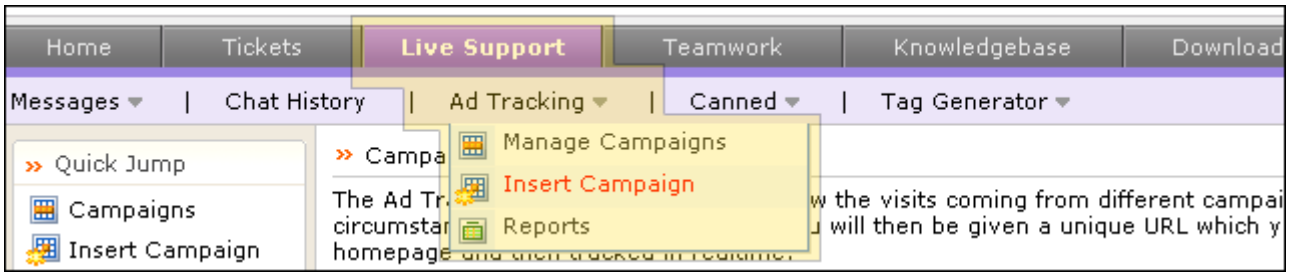
Users who click on this campaign URL will be redirected to http://www.yourhomepage.com/index.php. As well as this, the click and the **referrer URL** will be logged and become viewable within advert tracking reports.


User clicks on the campaign URL on www.site1.com
System redirects the user to the redirect URL
System logs the click and the referrer (www.site1.com)

Managing campaigns

To manage **advert campaigns**:

1. Open **Live Support** on the navigation menu bar, as shown below.



2. Open the **Ad Tracking** menu.
3. Click on **Manage Campaigns**.

You will be presented with a list of campaigns, as shown below.

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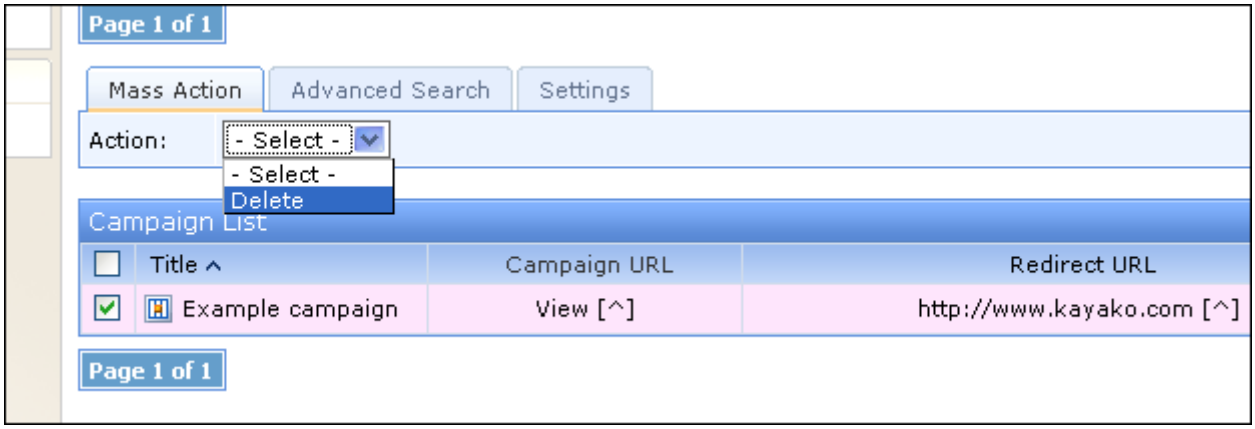
Selecting multiple campaigns (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, campaigns can be mass-deleted. Under the **Advanced Search** tab, campaigns can be searched for by redirect URL or campaign name. Under the **Settings** tab, the number of campaigns shown per page (if there are many) can be limited.



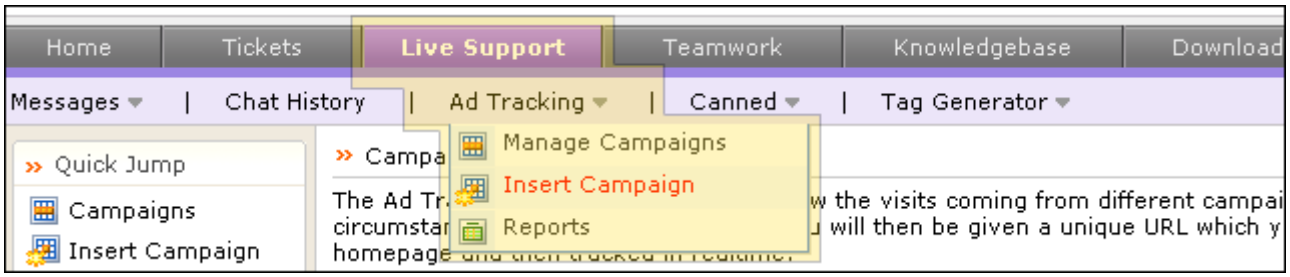
To edit an advert campaign, click on the campaign's title.

Refer to the file advert campaign fields section for documentation on the required fields for a new advert campaign.

Creating a new advert campaign

To create a new **advert campaign**:

1. Open **Live Support** on the navigation menu bar, as shown below.



2. Open the **Ad Tracking** menu.
3. Click on **Insert Campaign**.

Refer to the file advert campaign fields section for documentation on the required fields for a new advert campaign.

Advert campaign fields

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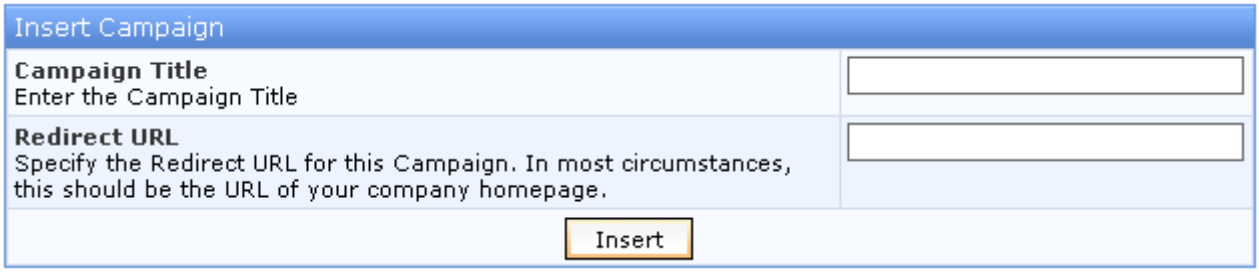
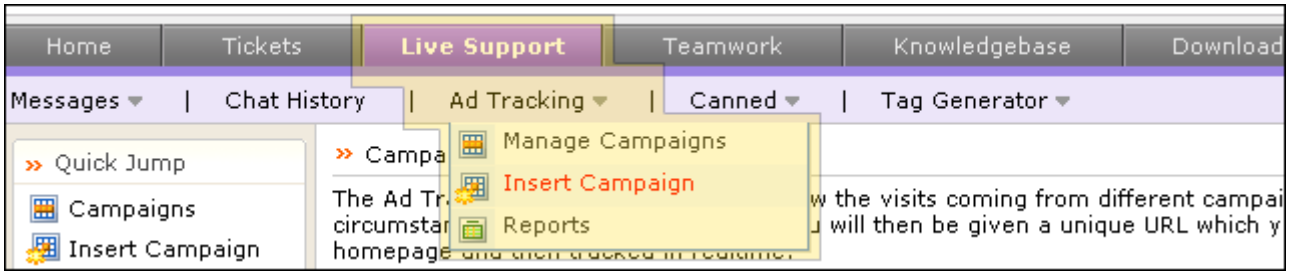

Insert Campaign
Campaign Title
Enter the Campaign Title
Redirect URL
Specify the Redirect URL for this Campaign. In most circumstances, this should be the URL of your company homepage.
Insert

- **Campaign Title** – a name for this advert/link campaign.
- **Redirect URL** – the URL to which users who click on the campaign URL (generated after creating the campaign) will be redirected.

Generating advert campaign reports

To generate and view **advert campaign reports**:

1. Open **Live Support** on the navigation menu bar, as shown below.



2. Open the **Ad Tracking** menu.
3. Click on **Reports**.

You will be presented with a table of **referrer statistics**, allowing you to track the number of referrals made by each link hoster.

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Canned messages

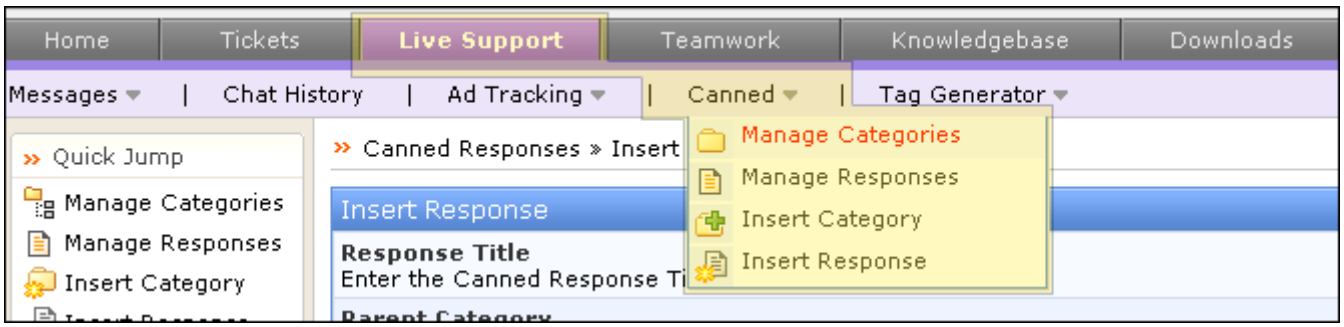
A **canned message** is very much akin to a predefined reply. Created and managed via the **staff control panel**, the canned messages list is populated in the **LiveResponse** application at login.

During a chat session, a user can send a canned message to a client. A canned message can be a text message, an image, a URL or (highlighted) code.

Managing canned message categories

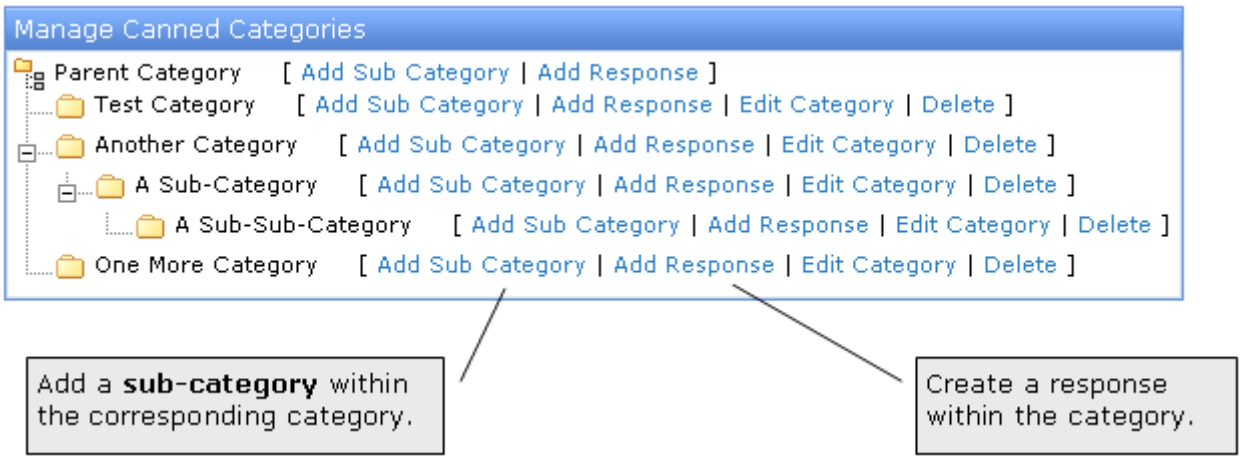
To view and manage **canned message categories**:

1. Open **Live Support** on the navigation menu bar, as shown below.



2. Open the **Canned** menu.
3. Click on **Manage Categories**.

You will be presented with a list of canned message categories, as shown below.


Manage Canned Categories
Parent Category [Add Sub Category | Add Response]
Test Category [Add Sub Category | Add Response | Edit Category | Delete]
Another Category [Add Sub Category | Add Response | Edit Category | Delete]
A Sub-Category [Add Sub Category | Add Response | Edit Category | Delete]
A Sub-Sub-Category [Add Sub Category | Add Response | Edit Category | Delete]
One More Category [Add Sub Category | Add Response | Edit Category | Delete]
Add a sub-category within the corresponding category.
Create a response within the category.

To **edit** a category, click on the corresponding edit link. Refer to the canned message category fields section for documentation on the required fields for a canned message category.

Create a canned message category

To create a new canned message category:

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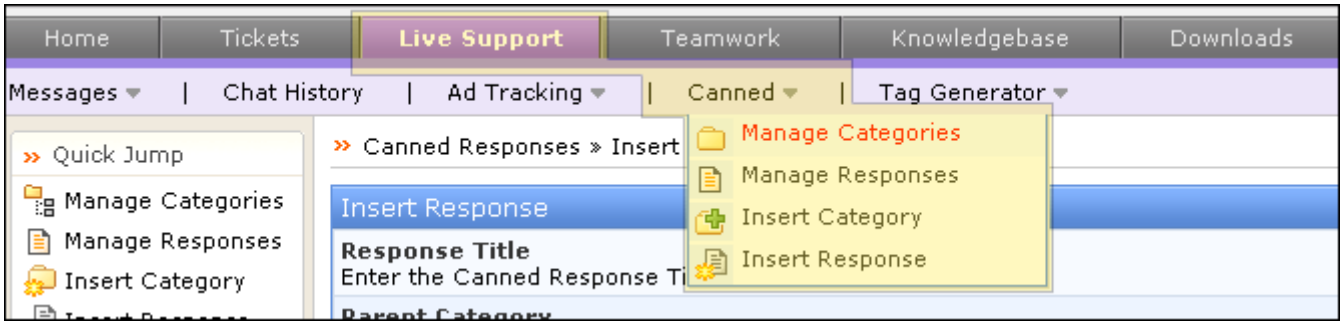
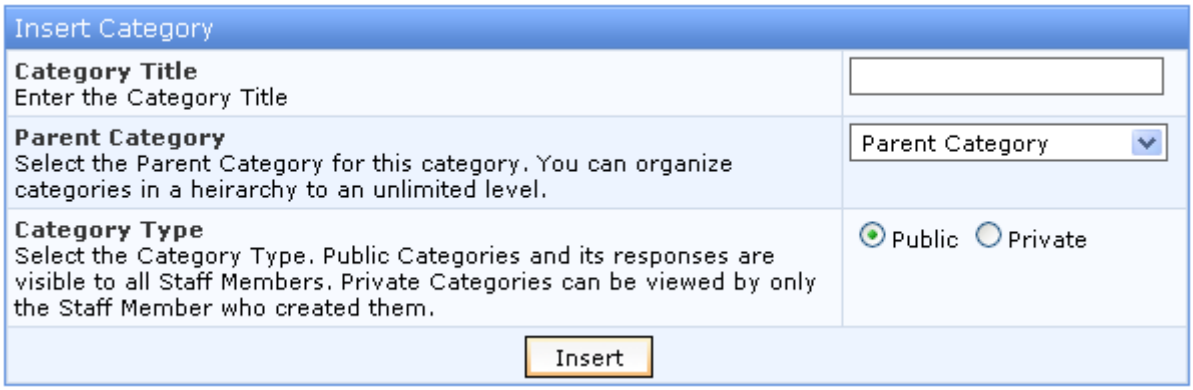
1. Open **Live Support** on the navigation menu bar, as shown below.



2. Open the **Canned** menu.
3. Click on **Insert Category**.

Refer to the canned message category fields section for documentation on the required fields for a new canned message category.

Canned message category fields


Insert Category
Category Title
Enter the Category Title
Parent Category
Select the Parent Category for this category. You can organize categories in a heirarchy to an unlimited level.
Parent Category
Category Type
Select the Category Type. Public Categories and its responses are visible to all Staff Members. Private Categories can be viewed by only the Staff Member who created them.
Public
Private
Insert

Category Fields

- **Category Title** – the title of the new category.
- **Parent Category** – the category that the new category will be placed under. Leaving this set to **Parent Category** will create the new category at the "root".
- **Category Type** – a **public** category is available to all staff users. A **private** category is available only to yourself.

Managing canned message replies

To view and manage **canned message replies**:

1. Open **Live Support** on the navigation menu bar, as shown below.

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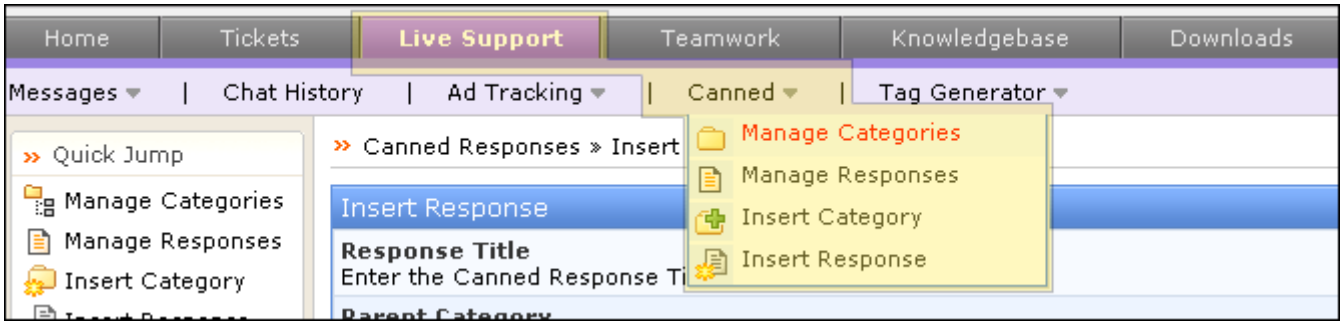
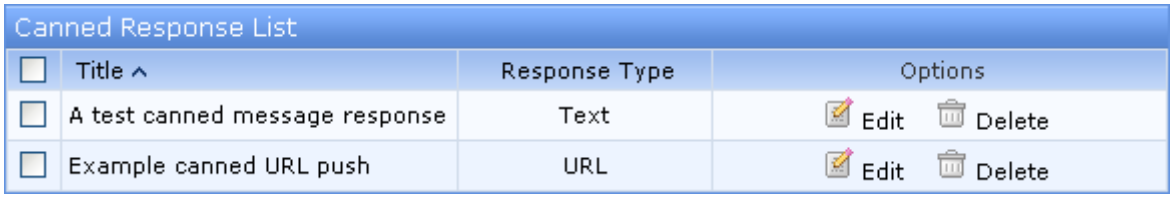
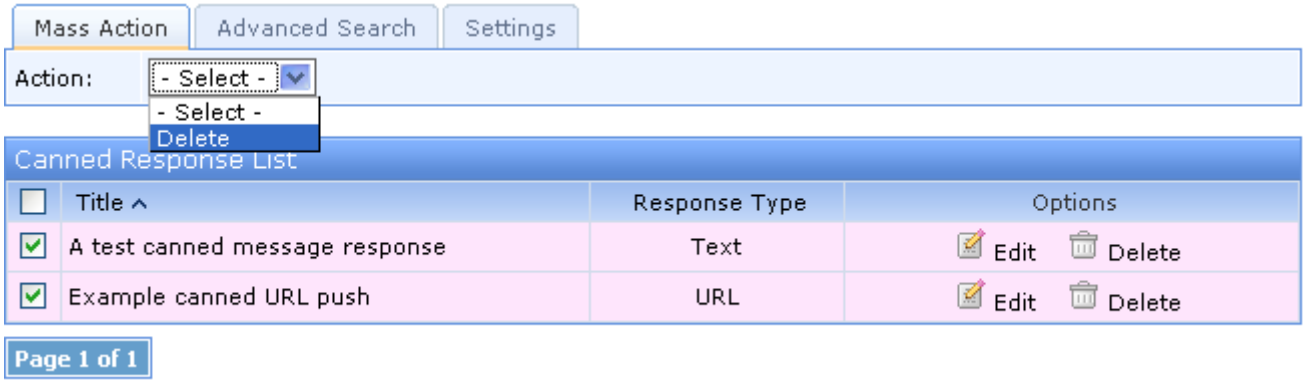


2. Open the **Canned** menu.
3. Click on **Manage Replies**.

You will be presented with a list of canned message replies, as shown below.



Selecting multiple replies (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, replies can be mass-deleted. Under the **Advanced Search** tab, replies can be searched for by reply title or its contents. Under the **Settings** tab, the number of replies shown per page (if there are many) can be limited.



To **edit** a canned message reply, click on the corresponding edit icon.

Refer to the file canned message reply fields section for documentation on the required fields for a canned message response.

Creating a new canned message response

To create a new **canned message response**:

1. Open **Live Support** on the navigation menu bar, as shown below.

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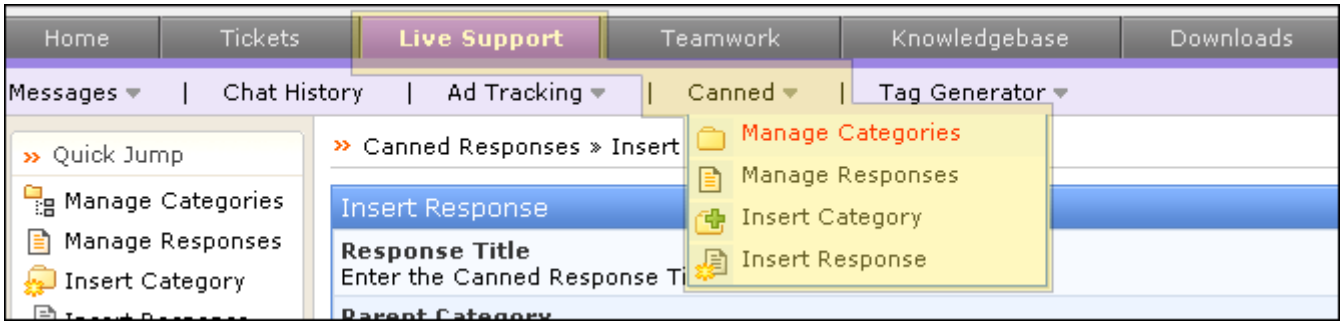
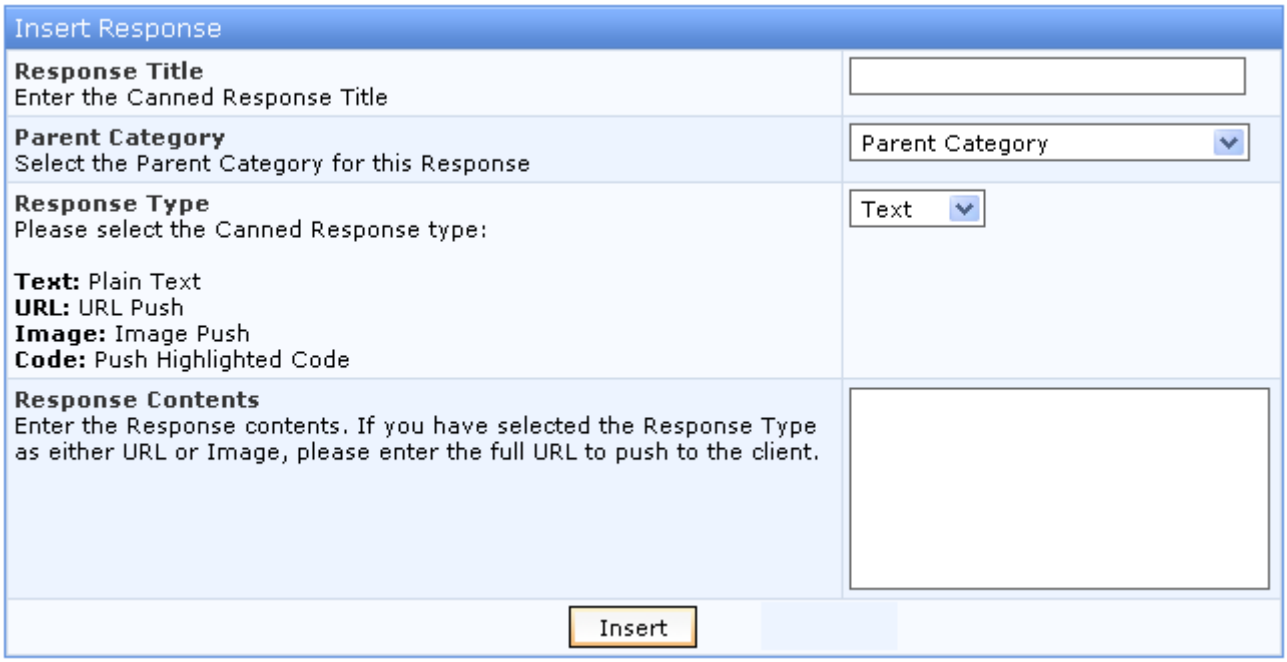


2. Open the **Canned** menu.

3. Click on **Insert Response**.

Refer to the file canned message reply fields section for documentation on the required fields for a new canned message response.

Canned message reply fields


Insert Response
Response Title
Enter the Canned Response Title
Parent Category
Select the Parent Category for this Response
Parent Category
Response Type
Please select the Canned Response type:
Text
Text: Plain Text
URL: URL Push
Image: Image Push
Code: Push Highlighted Code
Response Contents
Enter the Response contents. If you have selected the Response Type as either URL or Image, please enter the full URL to push to the client.
Insert

- **Response Title** – the title of the new response.
- **Parent Category** – the category in which the new response will be created.
- **Response Type** – the type of the response (text, URL, image or code). If set to **code**, the text sent to the user will be **syntax highlighted**. If set to **image** or **URL**, the image or URL will be pushed to the user.
- **Response Contents** – the contents of the canned response. If the **Response Type** (above) was set to **image** or **URL**, the contents entered here must be a complete URL.

Click on the **Insert** button to create the new reply.

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Tag generator

The **tag generator** is used to generate a series of **JavaScript tags** used to integrate your website(s) with the live support, visitor tracking and advertisement campaign tracking features within **LiveResponse**.

HTML button / E-mail Signature – when a user clicks on this button, a Live Chat Request window will open (depending on the availability of your live support departments).

Text button – when a user clicks on this text link, a Live Chat Request window will open (depending on the availability of your live support departments).

Live Support is Unavailable. Leave a Message

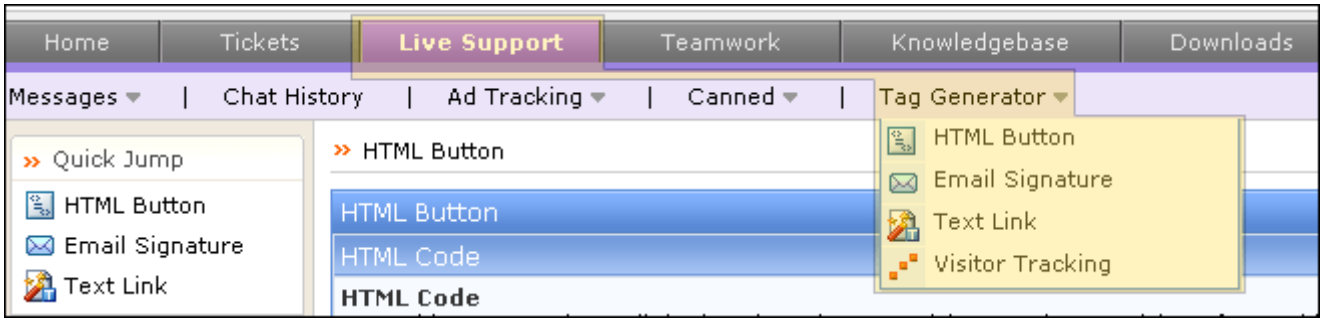
Visitor tracking JavaScript – when included on one of your web pages, visitors to that page can be tracked via the LiveResponse Client Application.

```
<!-- Begin SupportSuite Javascript Code -->
<script language="javascript" src="http://www.e
<!-- End SupportSuite Javascript Code -->
```

Creating a Live Support status button (for a website)

To create a Live Support HTML button:

1. Open **Live Support** on the navigation menu bar, as shown below.



2. Open the **Tag Generator** menu.
3. Click on **HTML Button**.

You will be presented with a create HTML button form, as shown below.

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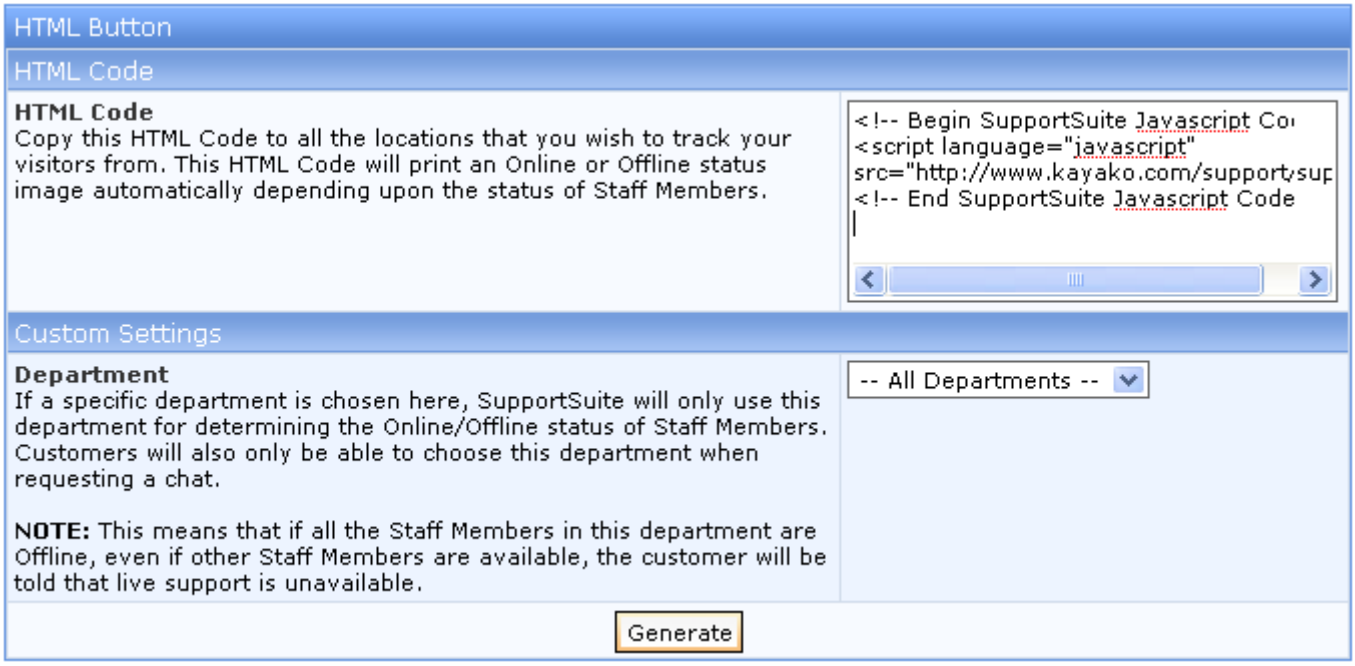

HTML Button
HTML Code
HTML Code
Copy this HTML Code to all the locations that you wish to track your visitors from. This HTML Code will print an Online or Offline status image automatically depending upon the status of Staff Members.
<!-- Begin SupportSuite Javascript Co
<script language="javascript"
src="http://www.kayako.com/support/sup
<!-- End SupportSuite Javascript Code
Custom Settings
Department
If a specific department is chosen here, SupportSuite will only use this department for determining the Online/Offline status of Staff Members. Customers will also only be able to choose this department when requesting a chat.
NOTE: This means that if all the Staff Members in this department are Offline, even if other Staff Members are available, the customer will be told that live support is unavailable.
-- All Departments --
Generate

- **HTML Code** – this code needs to be placed on your website where you want the live support status graphic to be displayed.
- **Department** – if you want this live support status graphic to display only the availability of a specific department, set it here.

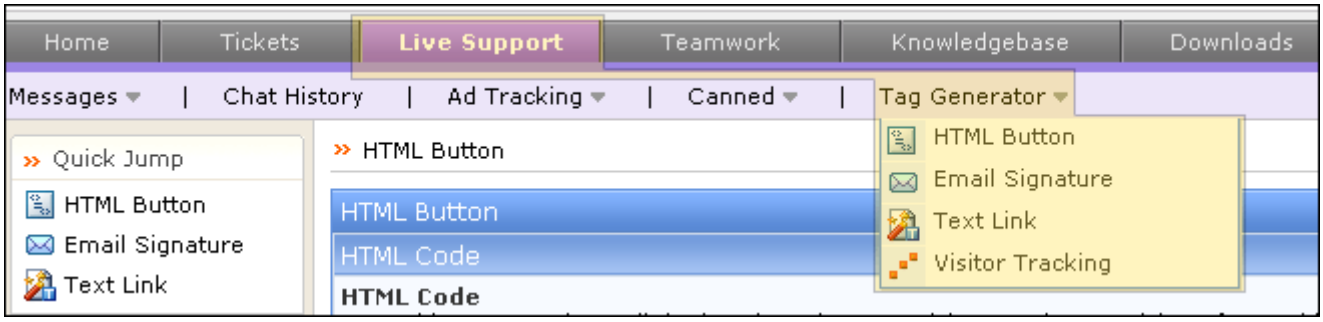
Depending on the status of each department, the default HTML buttons appear as the following:

When a user clicks on a HTML button, he or she will be presented with either a Send Message form (if live support is unavailable) or a Request Live Chat form (if live support is available).

Creating a Live Support status button (for an e-mail signature)

To create a Live Support e-mail signature button that will display the status of your live support department(s):

1. Open **Live Support** on the navigation menu bar, as shown below.



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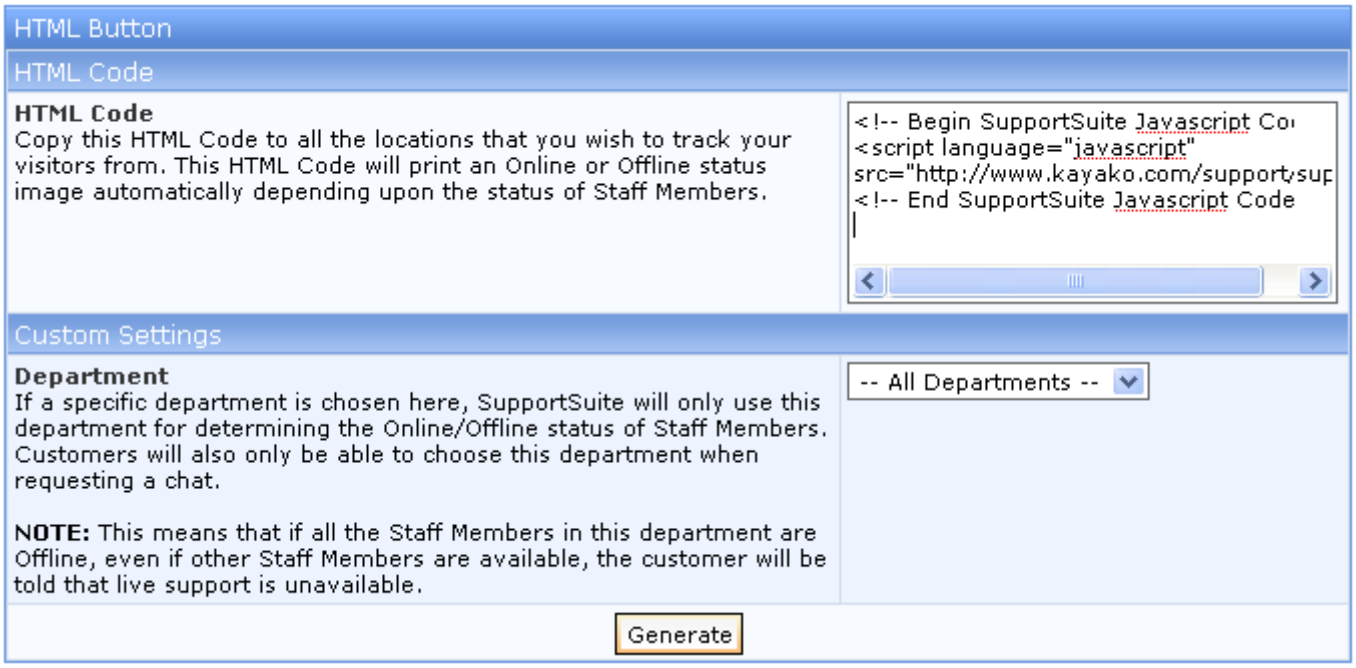
2. Open the **Tag Generator** menu.
3. Click on **E-mail Signature**.

You will be presented with a create e-mail signature form, as shown below.


HTML Button
HTML Code
HTML Code
Copy this HTML Code to all the locations that you wish to track your visitors from. This HTML Code will print an Online or Offline status image automatically depending upon the status of Staff Members.
<!-- Begin SupportSuite Javascript Co
<script language="javascript"
src="http://www.kayako.com/support/sup
<!-- End SupportSuite Javascript Code
Custom Settings
Department
If a specific department is chosen here, SupportSuite will only use this department for determining the Online/Offline status of Staff Members. Customers will also only be able to choose this department when requesting a chat.
NOTE: This means that if all the Staff Members in this department are Offline, even if other Staff Members are available, the customer will be told that live support is unavailable.
-- All Departments --
Generate

- **HTML Code** – this code needs to be placed within your e-mail signature.
- **Department** – if you want this live support status graphic to display only the availability of a specific department, set it here.

Depending on the status of each department, the default buttons appear as the following:

When a user clicks on a button, he or she will be presented with either a Send Message form (if live support is unavailable) or a Request Live Chat form (if live support is available).

Creating a Live Support status text link

To create a Live Support status text link that will display the status of your live support department(s):

1. Open **Live Support** on the navigation menu bar, as shown below.

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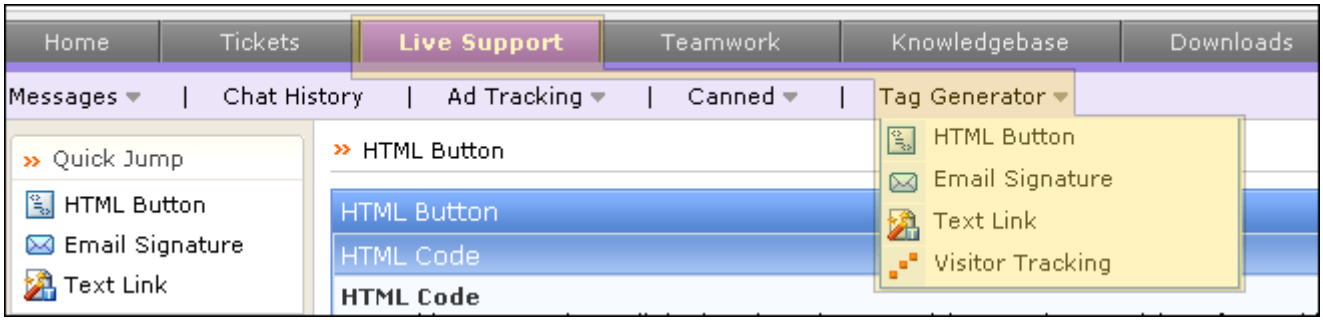
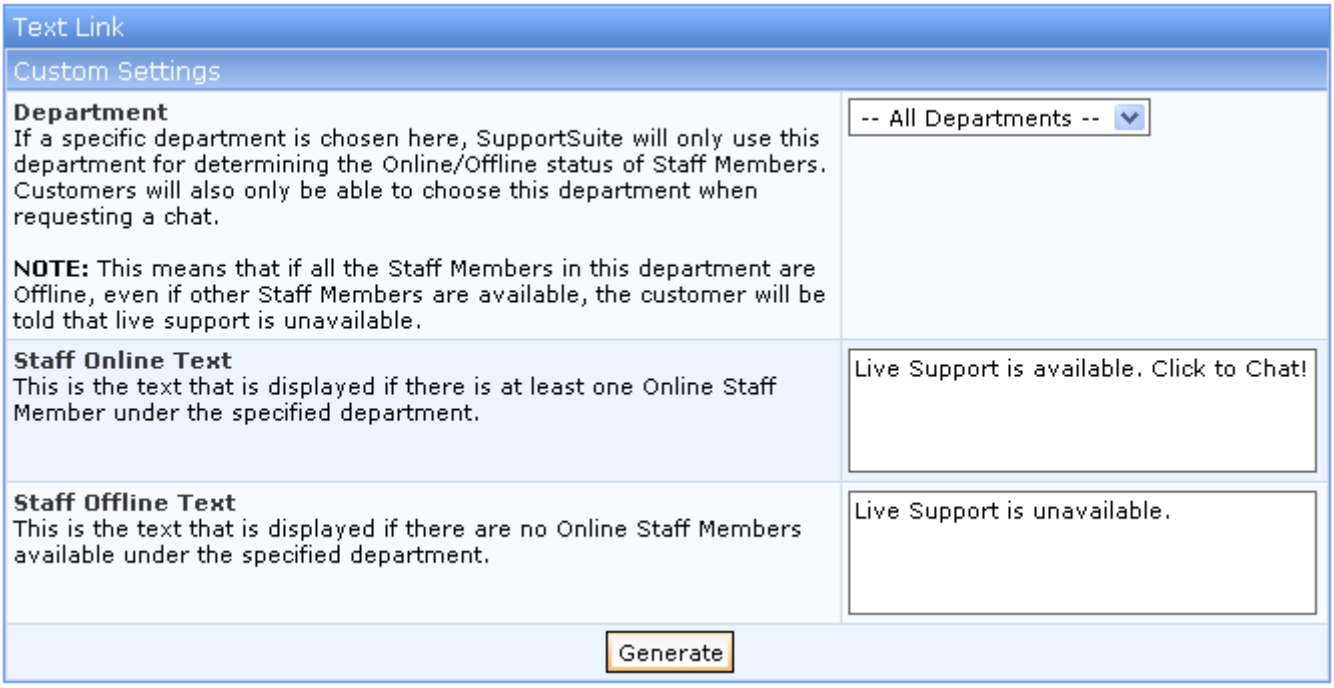


2. Open the **Tag Generator** menu.
3. Click on **Text Link**.

You will be presented with a create text link form, as shown below.


Text Link
Custom Settings
Department
If a specific department is chosen here, SupportSuite will only use this department for determining the Online/Offline status of Staff Members. Customers will also only be able to choose this department when requesting a chat.
NOTE: This means that if all the Staff Members in this department are Offline, even if other Staff Members are available, the customer will be told that live support is unavailable.
-- All Departments --
Staff Online Text
This is the text that is displayed if there is at least one Online Staff Member under the specified department.
Live Support is available. Click to Chat!
Staff Offline Text
This is the text that is displayed if there are no Online Staff Members available under the specified department.
Live Support is unavailable.
Generate

- **Department** – if you want this live support status text link to display only the availability of a specific department, set it here.
- **Staff Online Text** – the text to display if live support is available.
- **Staff Offline Text** – the text to display if live support is unavailable.

Click on the **Generate** button to generate the HTML code to display the text link.

Creating a visitor tracking JavaScript snippet

To create a JavaScript snippet that will track visitors on one or more of your web pages via the **LiveResponse** application:

1. Open **Live Support** on the navigation menu bar, as shown below.

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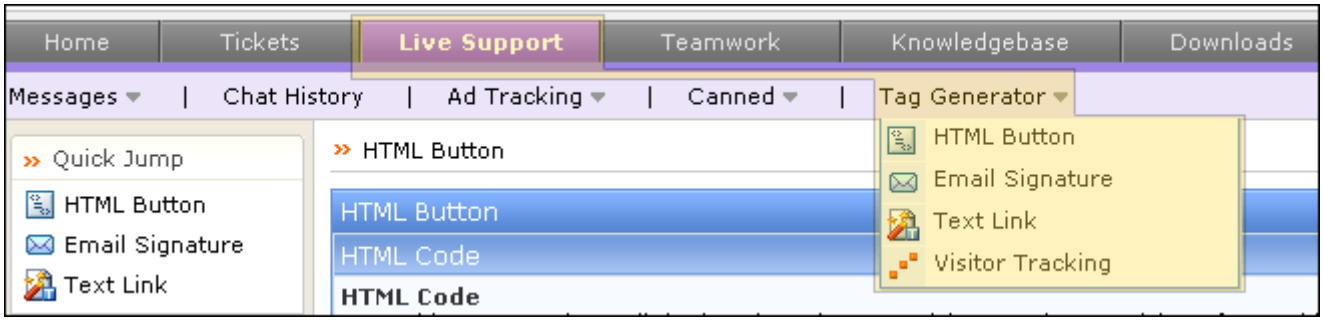
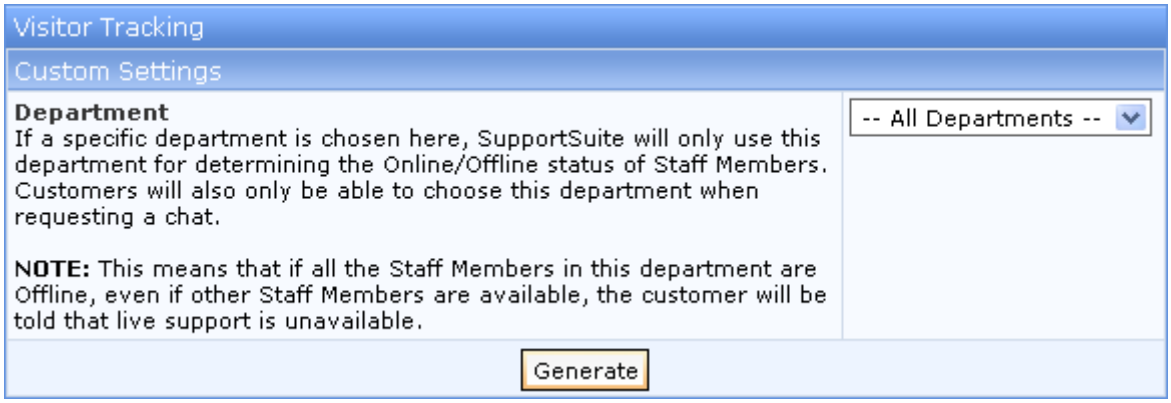


2. Open the **Tag Generator** menu.
3. Click on **Visitor Tracking**.

You will be presented with a create snippet form, as shown below.


Visitor Tracking
Custom Settings
Department
If a specific department is chosen here, SupportSuite will only use this department for determining the Online/Offline status of Staff Members. Customers will also only be able to choose this department when requesting a chat.
NOTE: This means that if all the Staff Members in this department are Offline, even if other Staff Members are available, the customer will be told that live support is unavailable.
-- All Departments --
Generate

- **Department** – if you want this live support status text link to display only the availability of a specific department, set it here.

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Teamwork

The **teamwork** modules of SupportSuite include several time management and group collaboration features such as a **calendar**, **address book** and a **task list**.

All teamwork features integrate heavily throughout a staff user's use of SupportSuite. For example, contacts (public or private) are searchable when creating a ticket (sending and e-mail). Event entries in the calendar are also viewable as an overview within the dashboard.

If SupportSuite is used in conjunction with Kayako's application **SyncWorks**, it is possible to synchronize all teamwork data (such as events, tasks and contacts) with a local installation of Microsoft Outlook.

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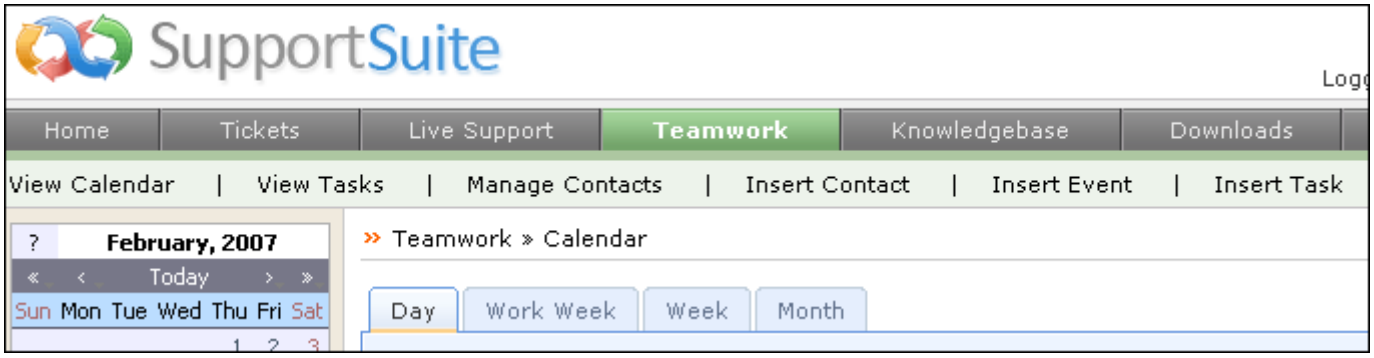
Calendar

To view the calendar:

1. Open **Teamwork** on the navigation menu bar, as shown below.



2. Click on **View Calendar**.

You will be presented with a calendar view of the current **day**, as shown below.

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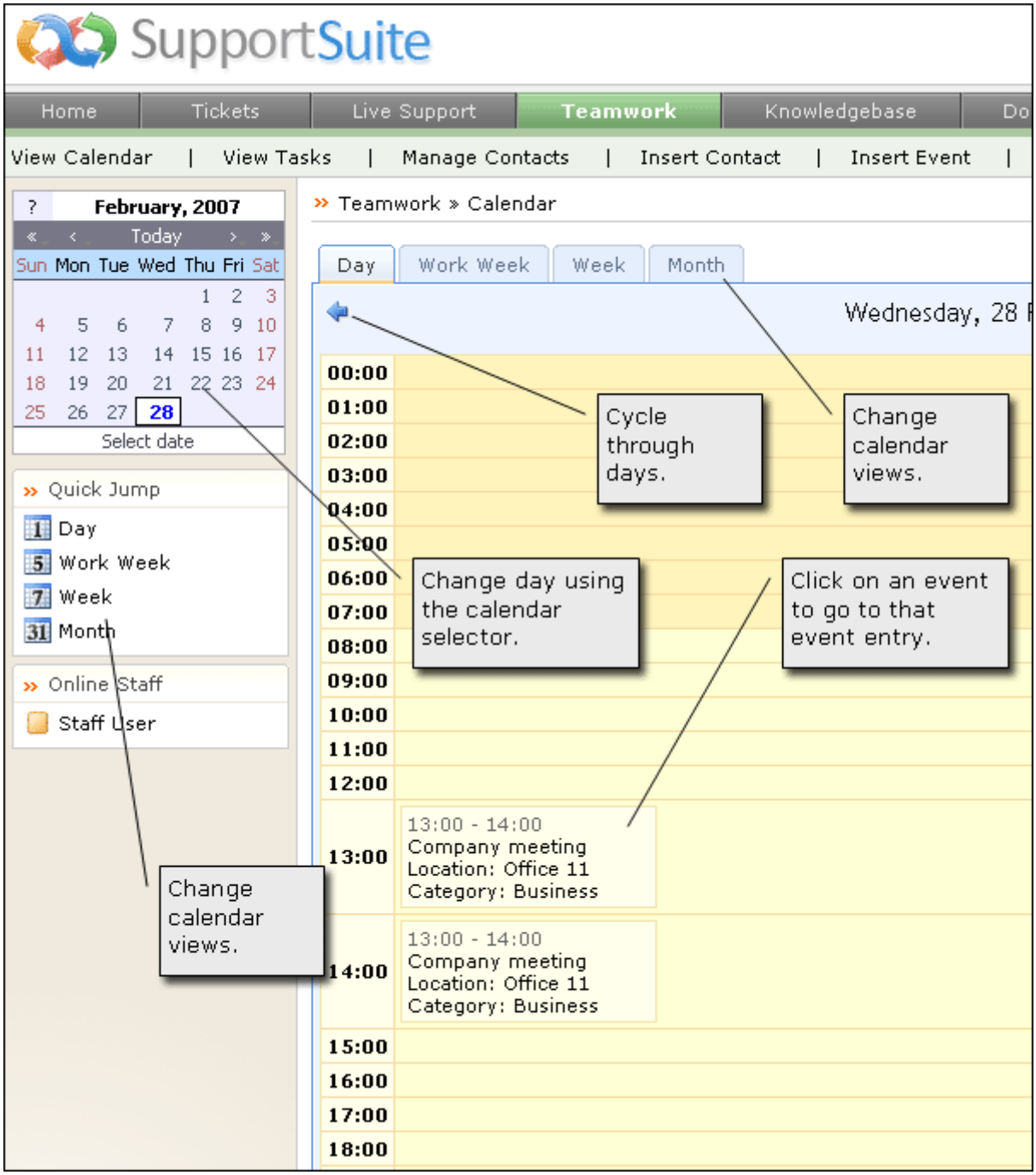

The **work week** view is exampled below.

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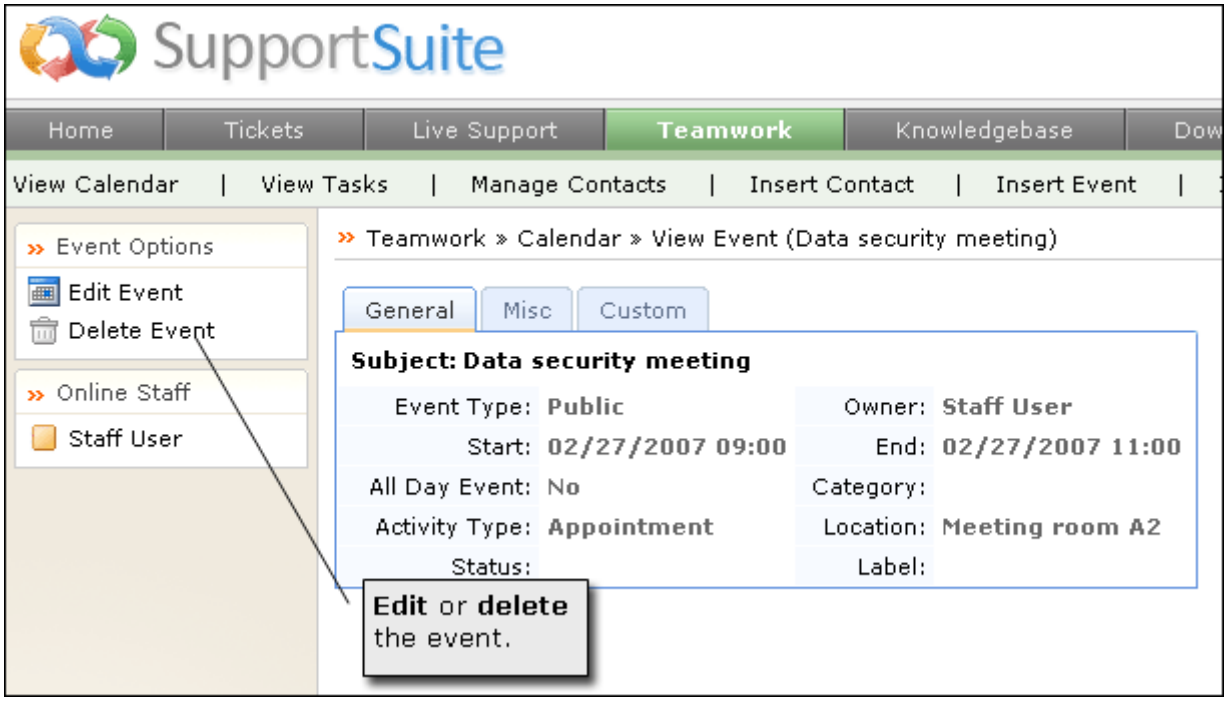
In any calendar view, clicking on an event will take you to that one event, as shown below.



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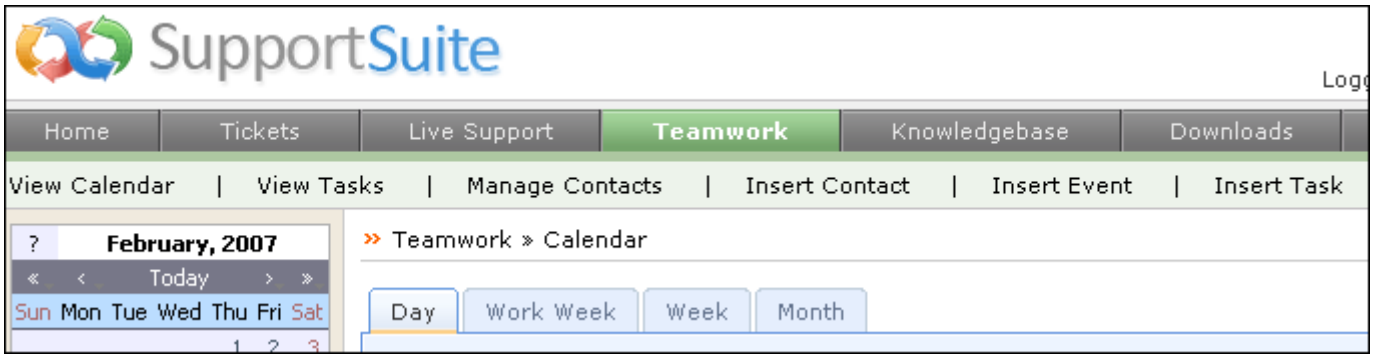
Creating a new event or appointment

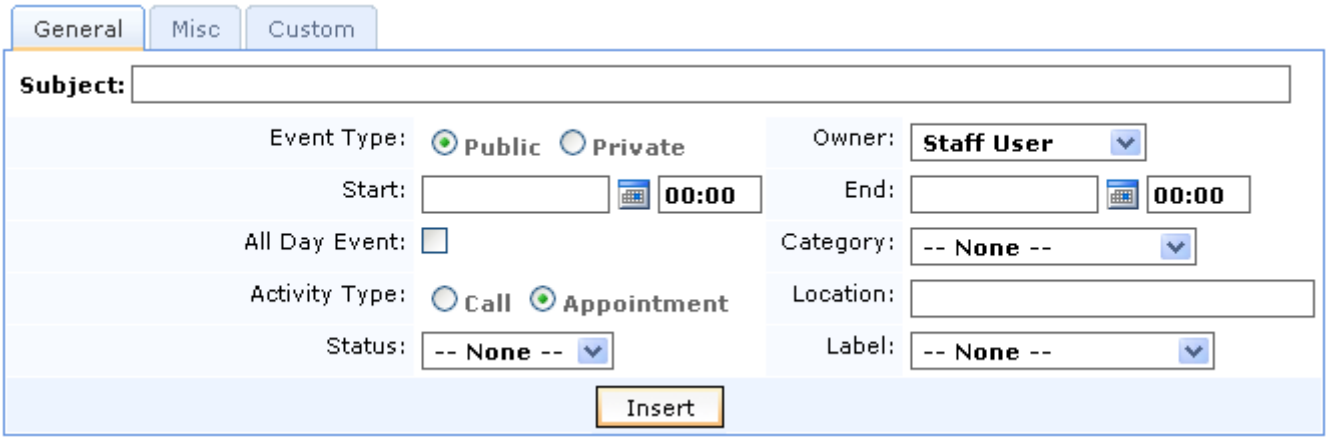
To create a new event or appointment:

1. Open **Teamwork** on the navigation menu bar, as shown below.



2. Click on **Insert Event**.

You will be presented with an event creation interface, as shown below.



- **Subject** – the title of the new event.
- **Event Type** – if set to **public**, the event will be viewable by all staff users. If set the **private**, the event will be viewable only by yourself.
- **Start** – the starting time and date of the event. Click on the calendar icon to open the date selector.
- **All Day Event** – if checked, the event will be marked as "All Day" and will not have a stop and start time.
- **Activity Type** – whether the new event is an **appointment** or a **call**. A call event type will be shown on a calendar with a small phone icon, indicating the event type.
- **Status** – whether the event is **planned**, has been **held** or is **not held**. Custom statuses are managed from within the **administrator control panel**.

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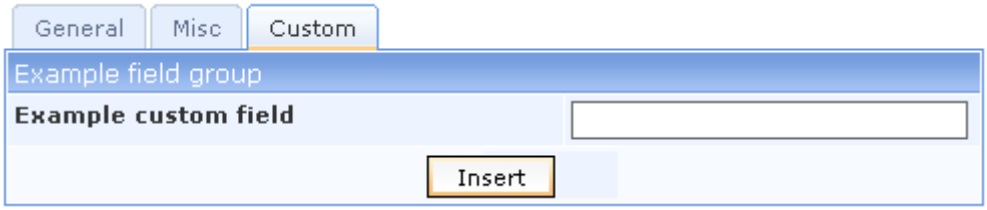
- **Owner** – the owner of the event.
- **End** – the ending time and date of the event. Click on the calendar icon to open the date selector.
- **Category** – the category the event will be placed under (for example, Business or Personal). Custom categories are managed from within the **administrator control panel**.
- **Location** – a field that allows you to set where the event will be held. The location of an event will also be displayed when viewing a calendar.
- **Label** – a label, such as important or vacation that can be attached to the event. Custom events are managed from within the **administrator control panel**.

Under the **Misc** tab, notes can be added for the event. Under the **Custom** tab, custom fields (managed from within the **administrator control panel**) are available, as shown below.



Click on the **Insert** button to add the new event.

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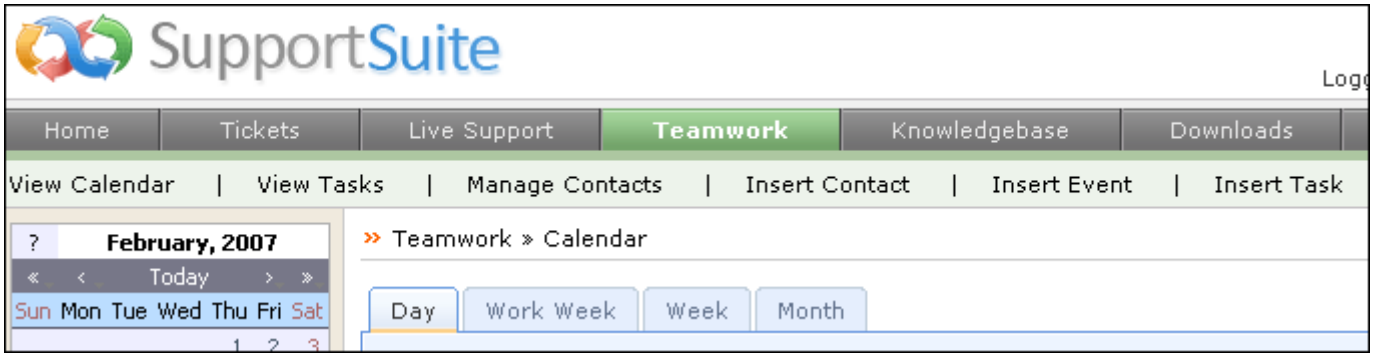
Contacts

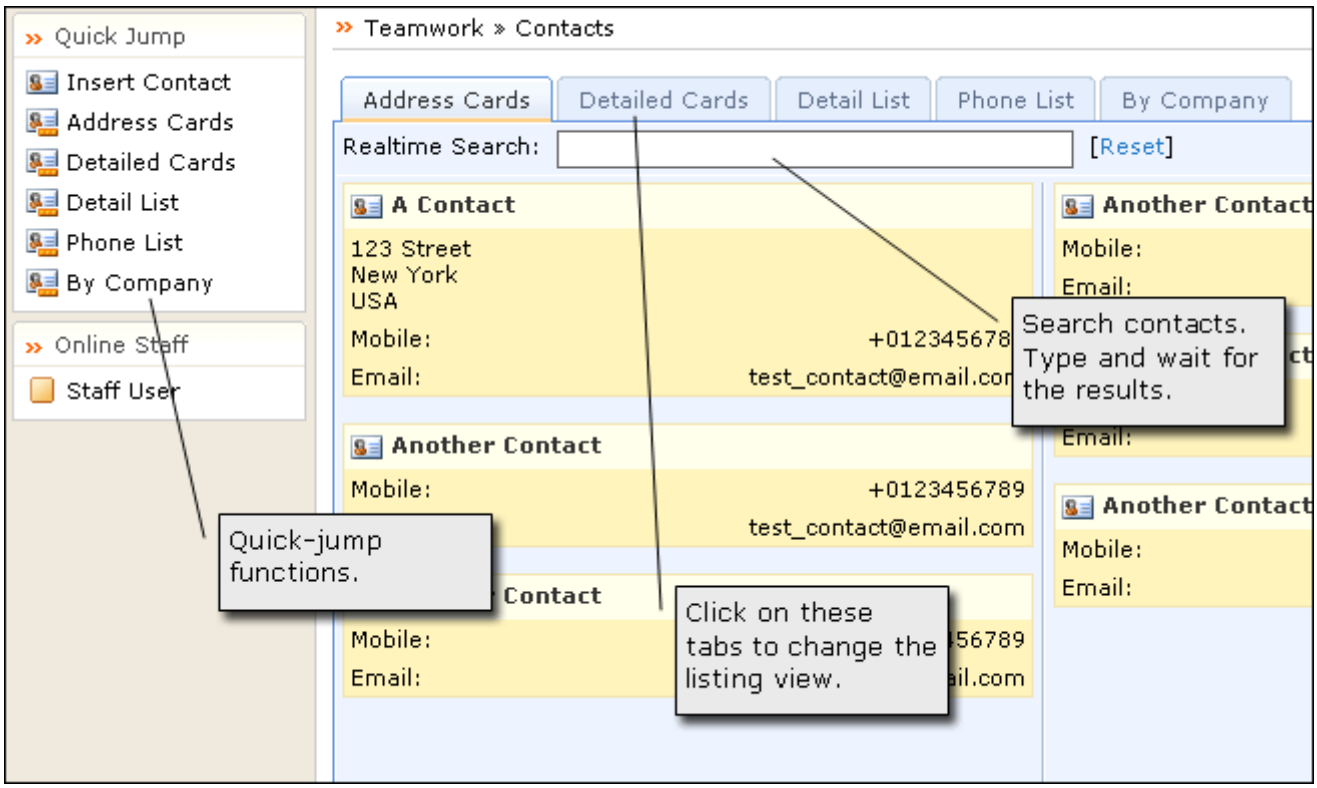
To view contacts stored in the system:

1. Open **Teamwork** on the navigation menu bar, as shown below.



2. Click on **Manage Contacts**.

You will be presented with a list of contact cards sorted alphabetically, as shown below.



To view a contact, click on that contact's contact card. You will be presented with the contact's details, as shown below.

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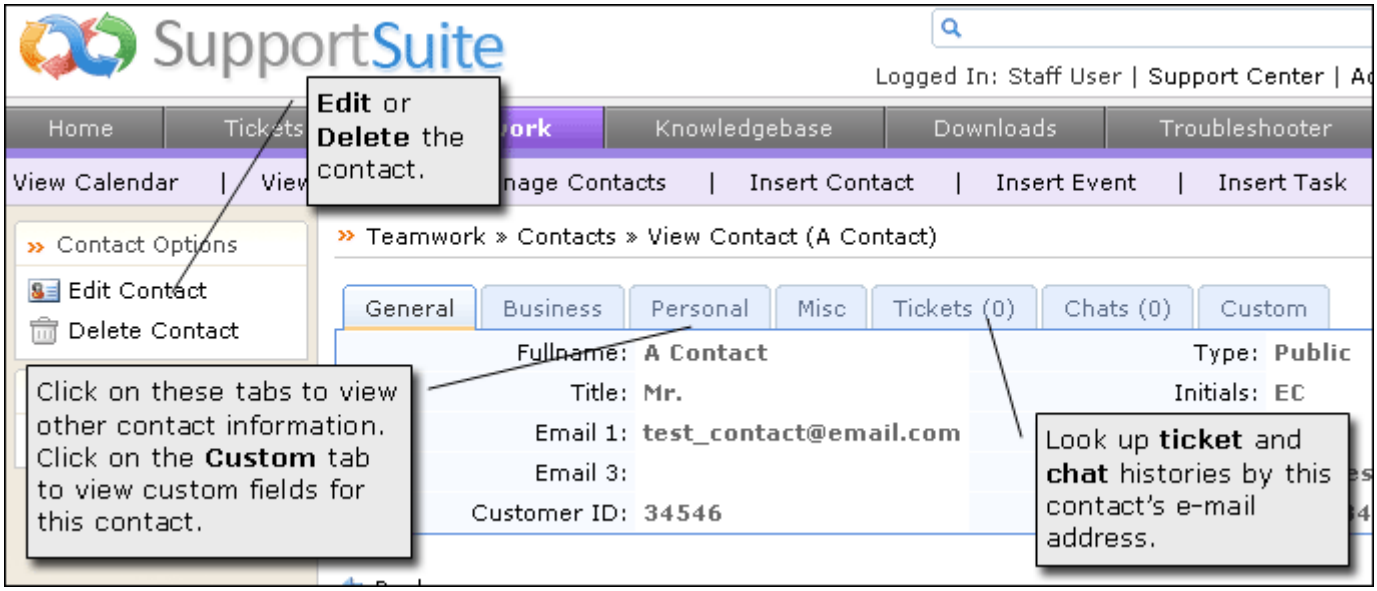
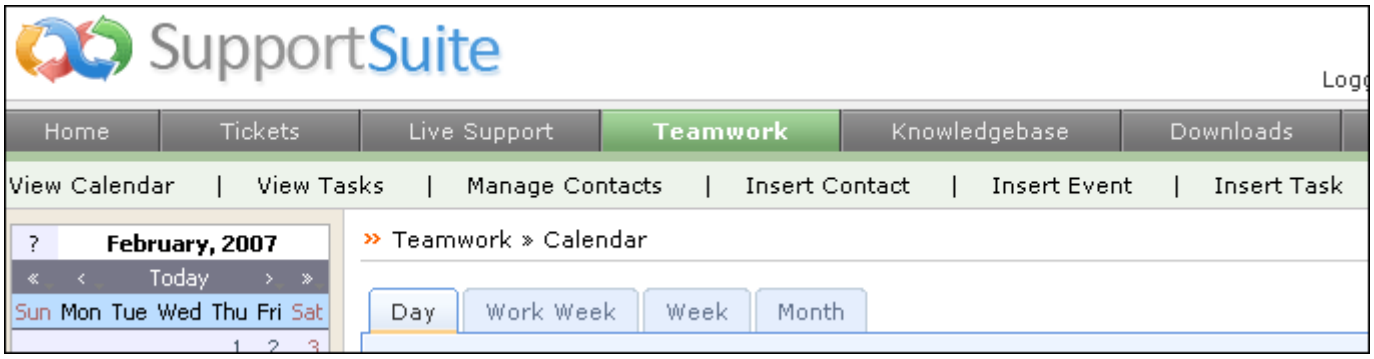


Note that **custom fields** for contacts are managed from within the **administrator control panel**.

Creating a new contact

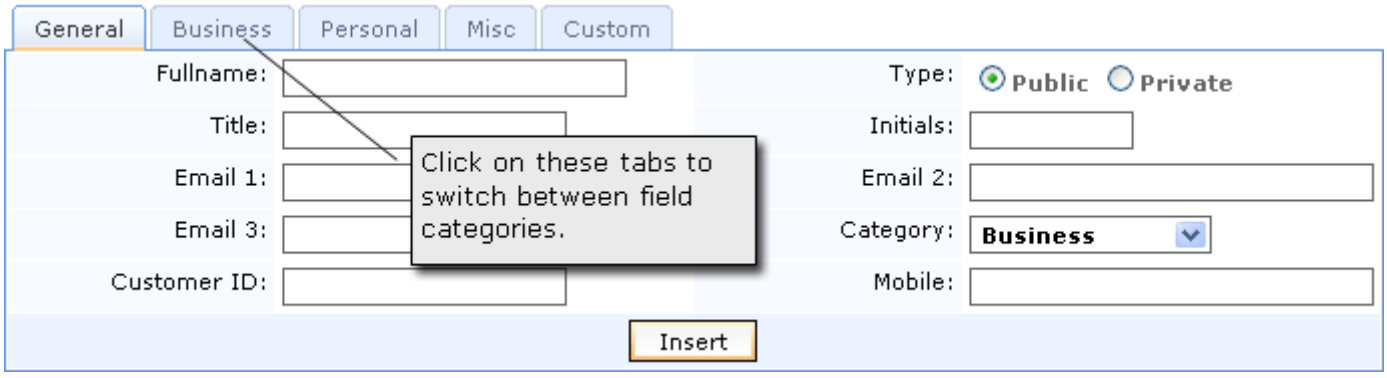
To create a new contact:

1. Open **Teamwork** on the navigation menu bar, as shown below.



2. Click on **Insert Contact**.

You will be presented with an event creation interface, as shown below.



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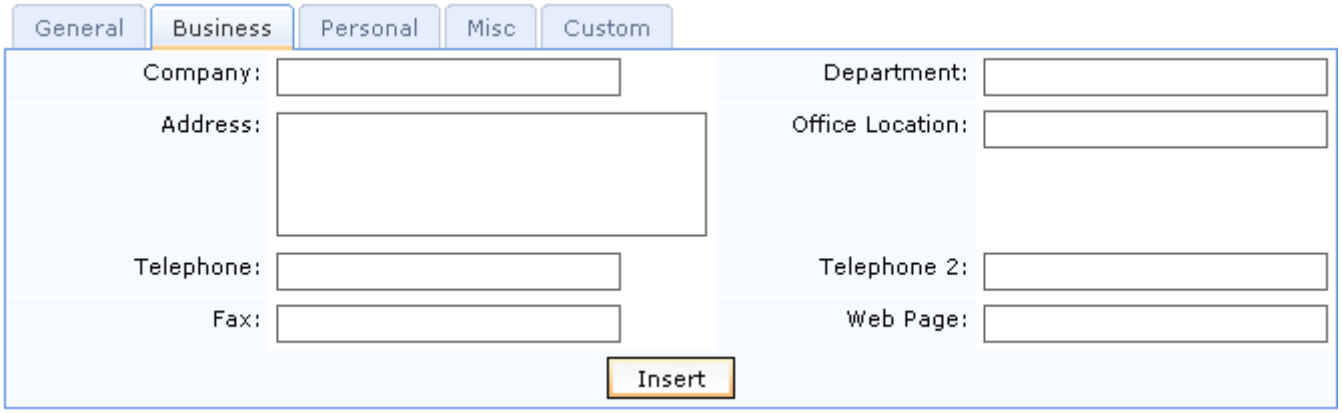
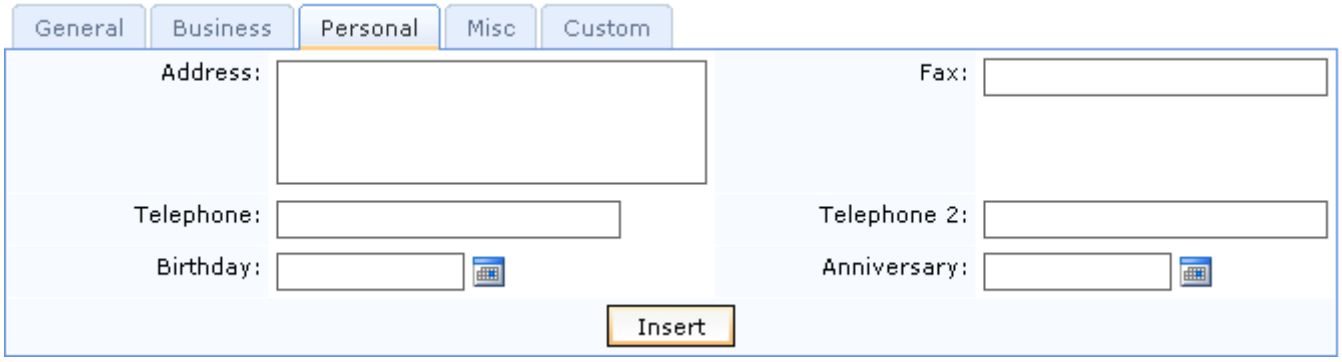
- **Fullname** – the name of the contact (forename and surname).
- **Title** – Mr., Mrs., Ms. Etc.
- **Email 1** – the primary e-mail address for the contact.
- **Email 2, 3** – the alternate e-mail addresses for the contact.
- **Customer ID** – a customer ID you can assign to the contact. This ID is not used within the system.
- **Type** – if set to public, the contact will be viewable by all staff users. If set to private, the contact will be viewable only to yourself.
- **Category** – the contact's category. Note that contact categories are managed from within the administrator control panel.
- **Mobile** – a mobile contact number for this contact.

Changing between the tabs (as shown below) allows you to enter further detailed information for each contact.





Click on the calendar icon to open the date selector.

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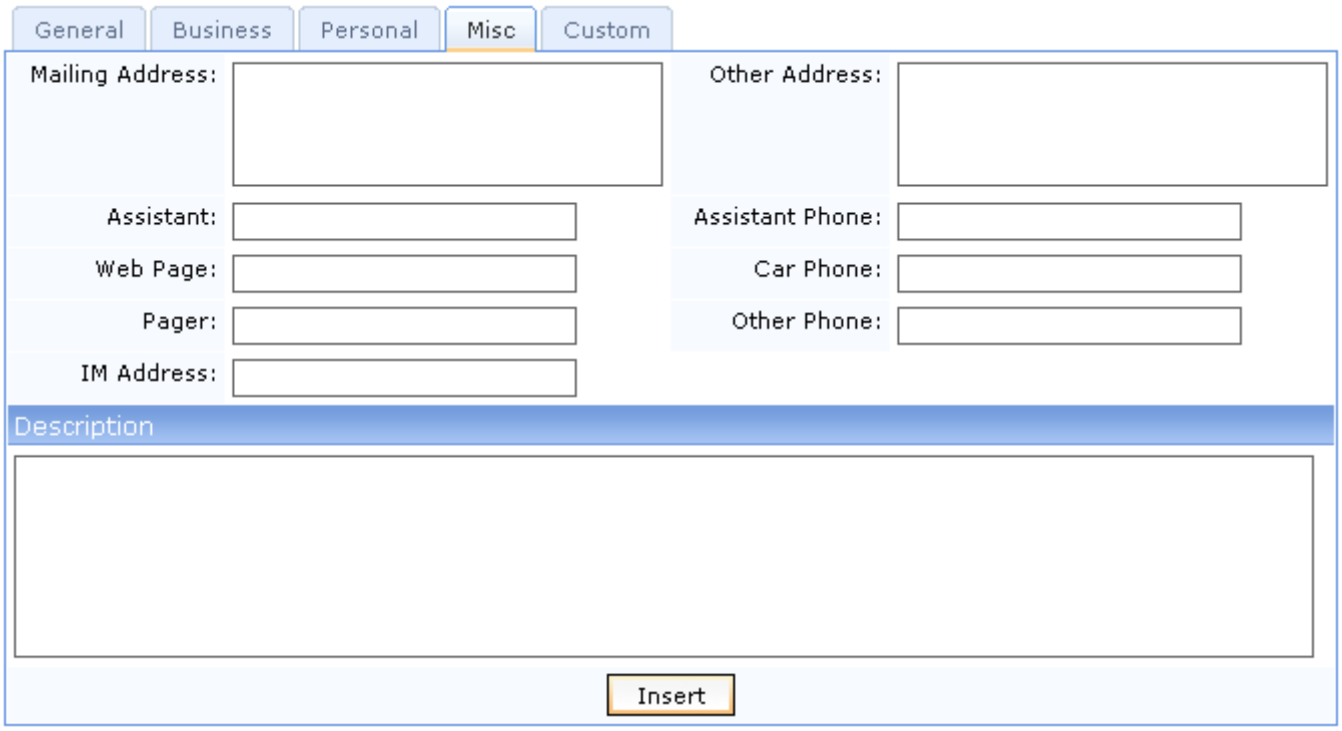

Under the **Custom** tab, custom fields (managed from within the **administrator control panel**) are available.

Click on the **Insert** button to create the contact.

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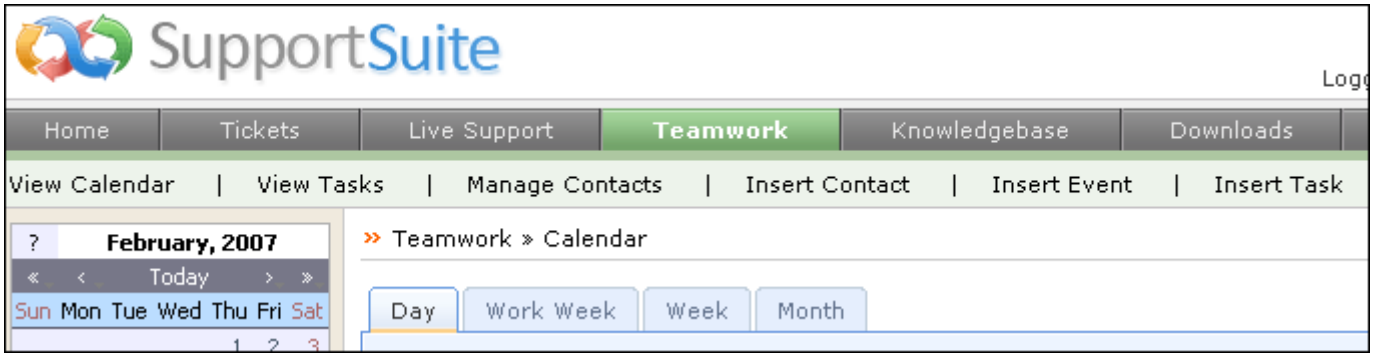
Task List

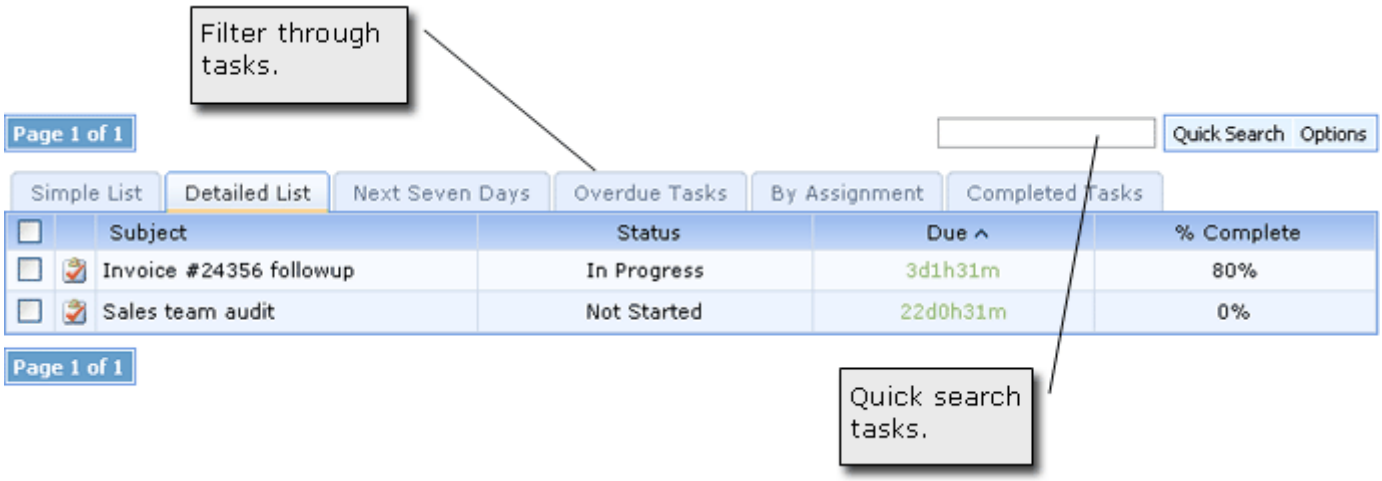
To view tasks logged in the system:

1. Open **Teamwork** on the navigation menu bar, as shown below.



2. Click on **View Tasks**.

You will be presented with a list of public tasks and private tasks created by you, as shown below.



Selecting multiple tasks (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, tasks can be mass-deleted. Under the **Advanced Search** tab, tasks can be searched for by subject. Under the **Settings** tab, the number of tasks shown per page (if there are many) can be limited.

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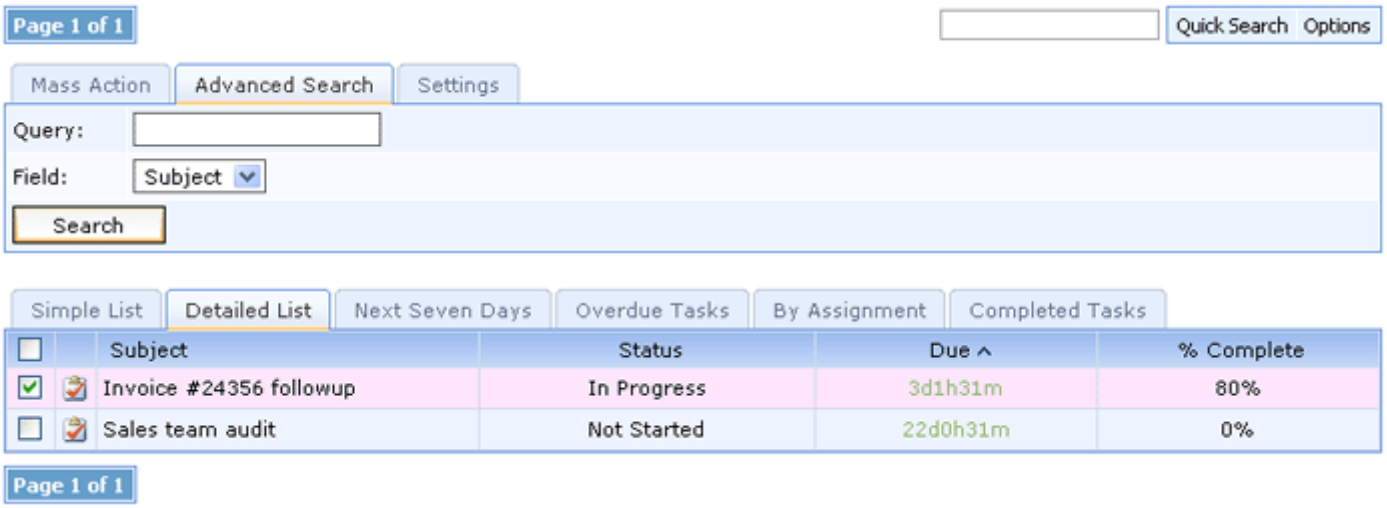
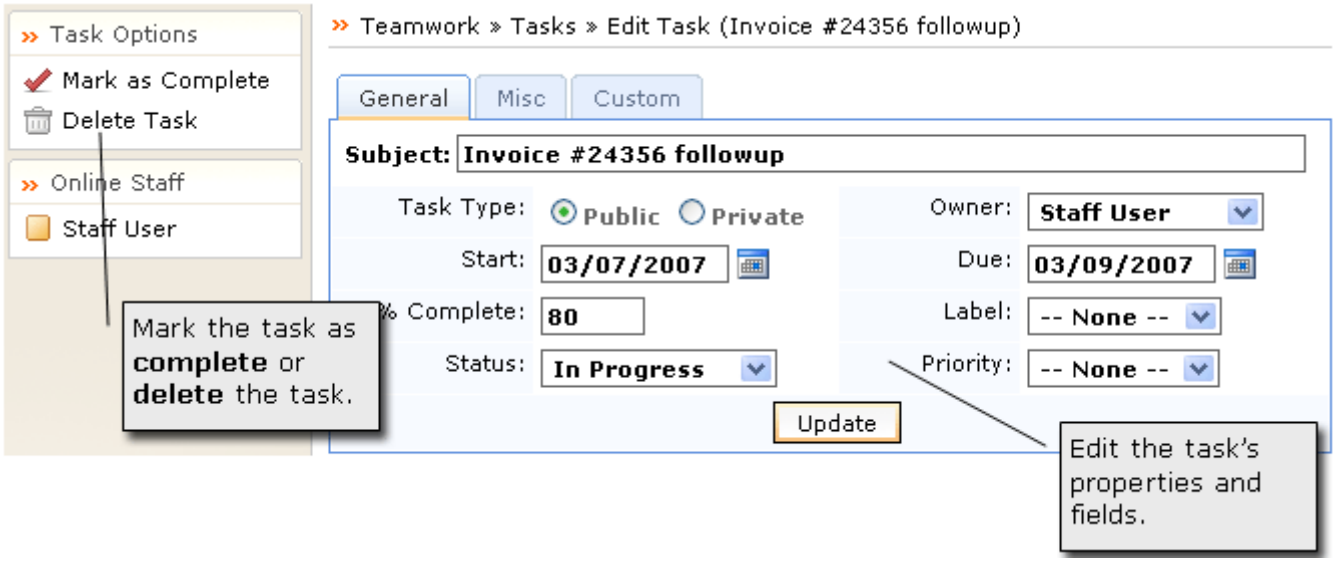


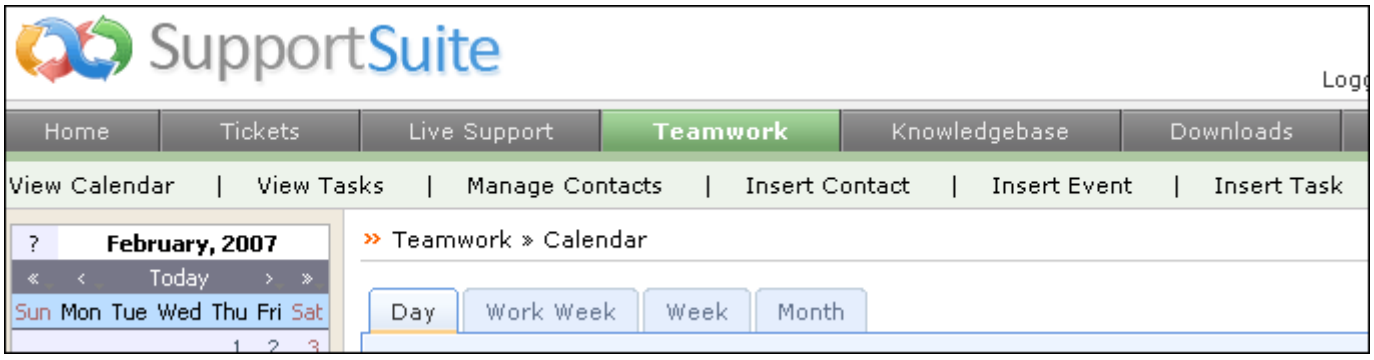
To view a task, click on a **task subject**. This will open the task, as shown below.



Creating a new task

To create a new task:

1. Open **Teamwork** on the navigation menu bar, as shown below.



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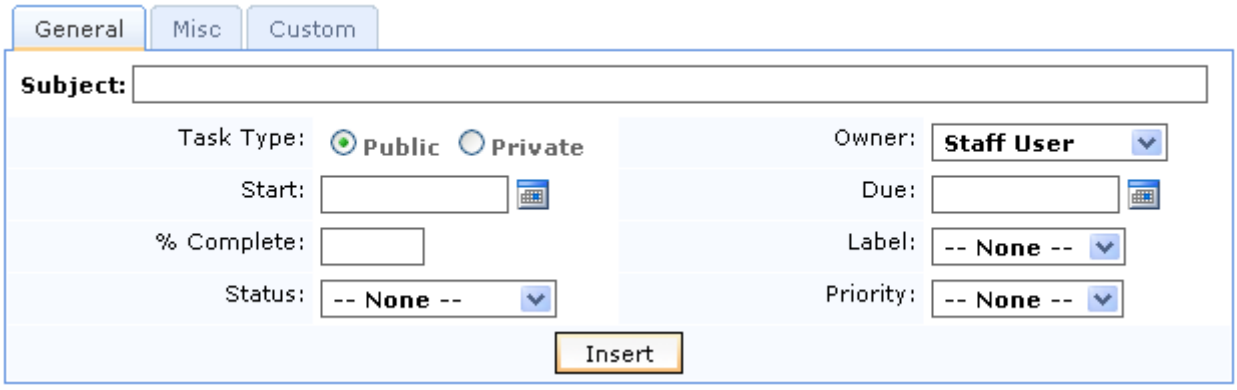
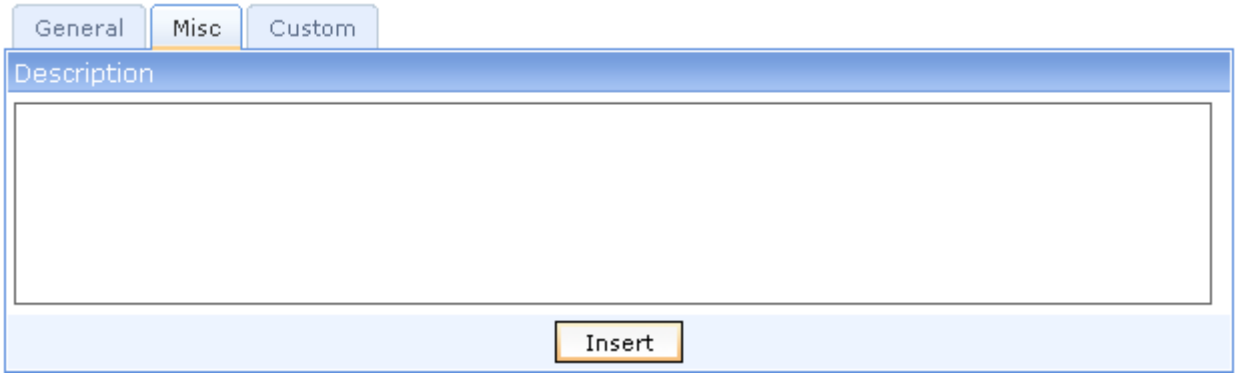
2. Click on **Insert Task**.

You will be presented with the create task form, as shown below.



- **Subject** – the subject of the new task.
- **Task Type** – if set to **public**, the task will be viewable to all staff users. If set to **private**, the task will be viewable only by yourself.
- **Start** – the **start** date of the task. Click on the calendar icon to open the date selector.
- **% Complete** – the percentage completion of the task.
- **Status** – the **status** of the new task. Task statuses are managed from within the **administrator control panel**.
- **Owner** – who **owns** the task (particular important if set to **private** (see Task Type above)).
- **Due** – the **due** date of the task; the date after which the task will be marked as over-due. Click on the calendar icon to open the date selector.
- **Label** – a **label** for the task. Task labels are managed from within the **administrator control panel**.
- **Priority** – the **priority** of the task.

Under the **Misc** tab, notes can be attached to the task as shown below.



Under the **Custom** tab, custom fields (managed from within the **administrator control panel**) are available.

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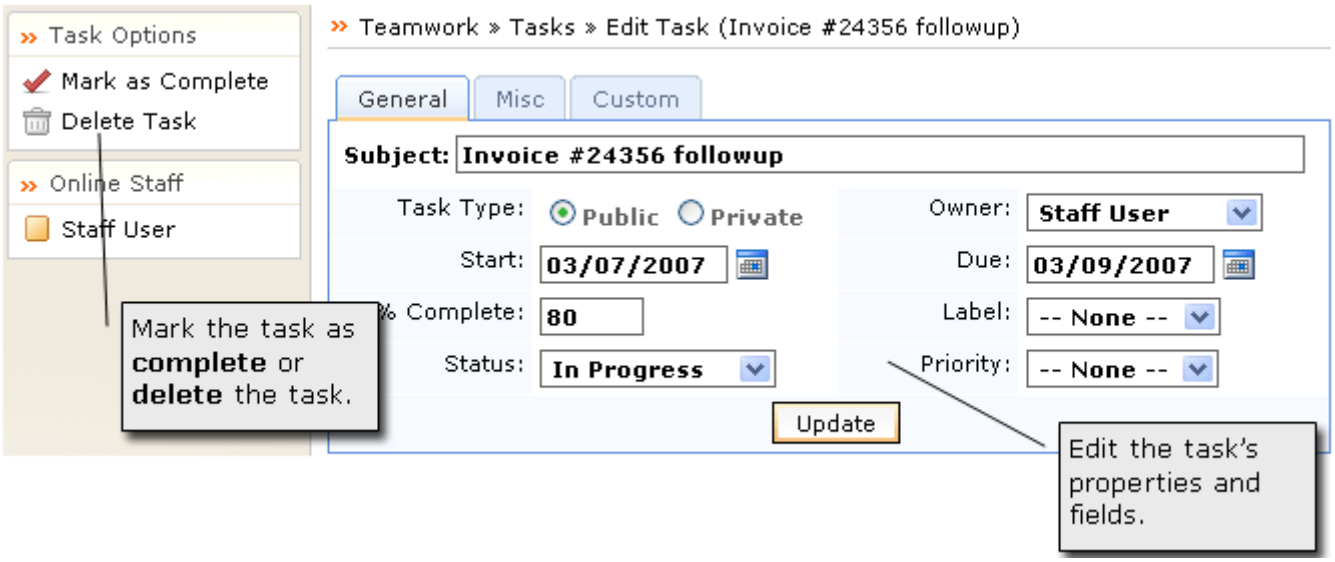
Click on the **Insert** button to create the task.

Marking a task as complete

When **viewing a task**, click on the **Mark Complete** button to mark the task as completed, as shown below.



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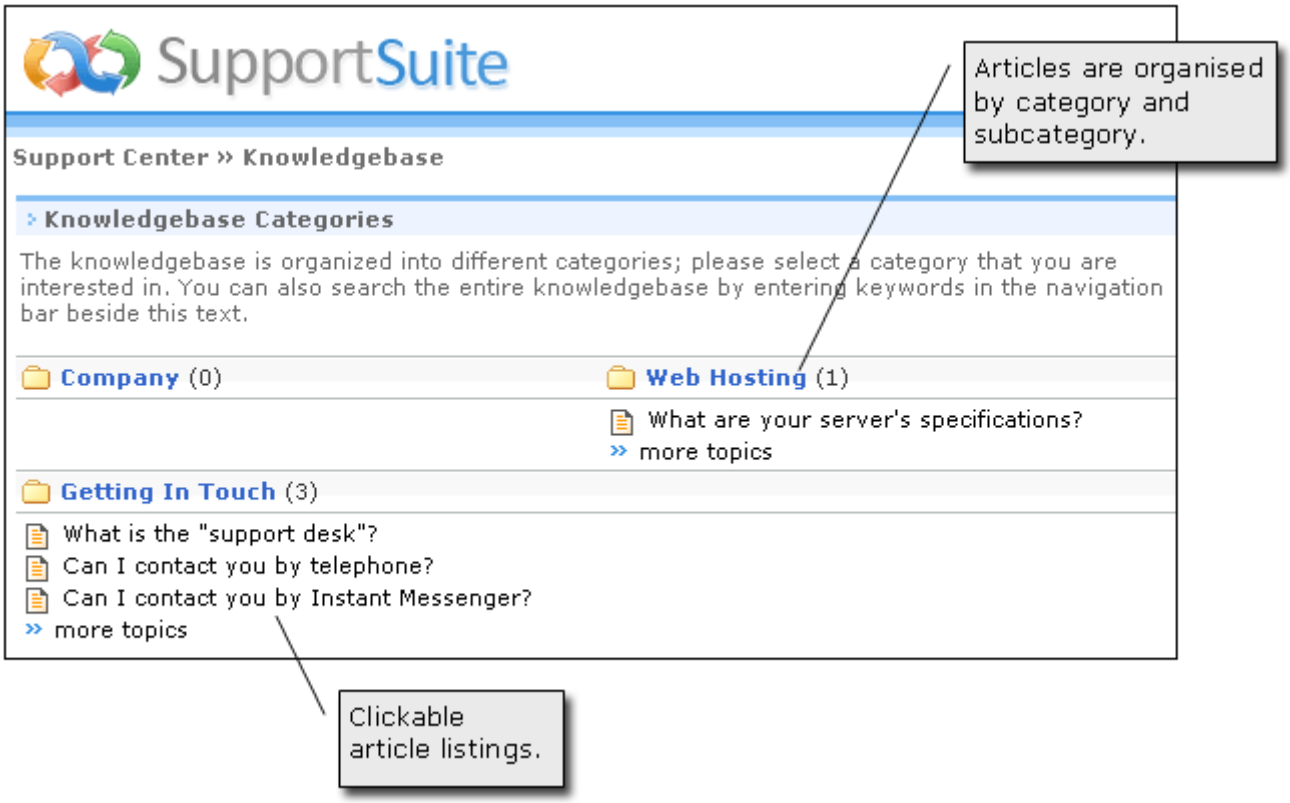
Knowledgebase

The **knowledgebase** is a database of categorized articles that act as an information repository (much like a frequently asked question database) for your clients. The client's interface to the knowledgebase is shown below.


SupportSuite
Articles are organised by category and subcategory.
Support Center » Knowledgebase
Knowledgebase Categories
The knowledgebase is organized into different categories; please select a category that you are interested in. You can also search the entire knowledgebase by entering keywords in the navigation bar beside this text.
Company (0)
Web Hosting (1)
What are your server's specifications?
» more topics
Getting In Touch (3)
What is the "support desk"?
Can I contact you by telephone?
Can I contact you by Instant Messenger?
» more topics
Clickable article listings.

Knowledgebase articles can be **rated** and also **commented** on by client users, per confirmation within the **administrator control panel**.

From within the **staff control panel**, knowledge base articles and their categories are managed and article comments can be moderated here as well.

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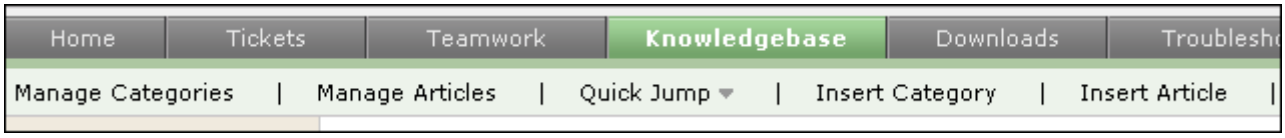
Managing knowledgebase categories

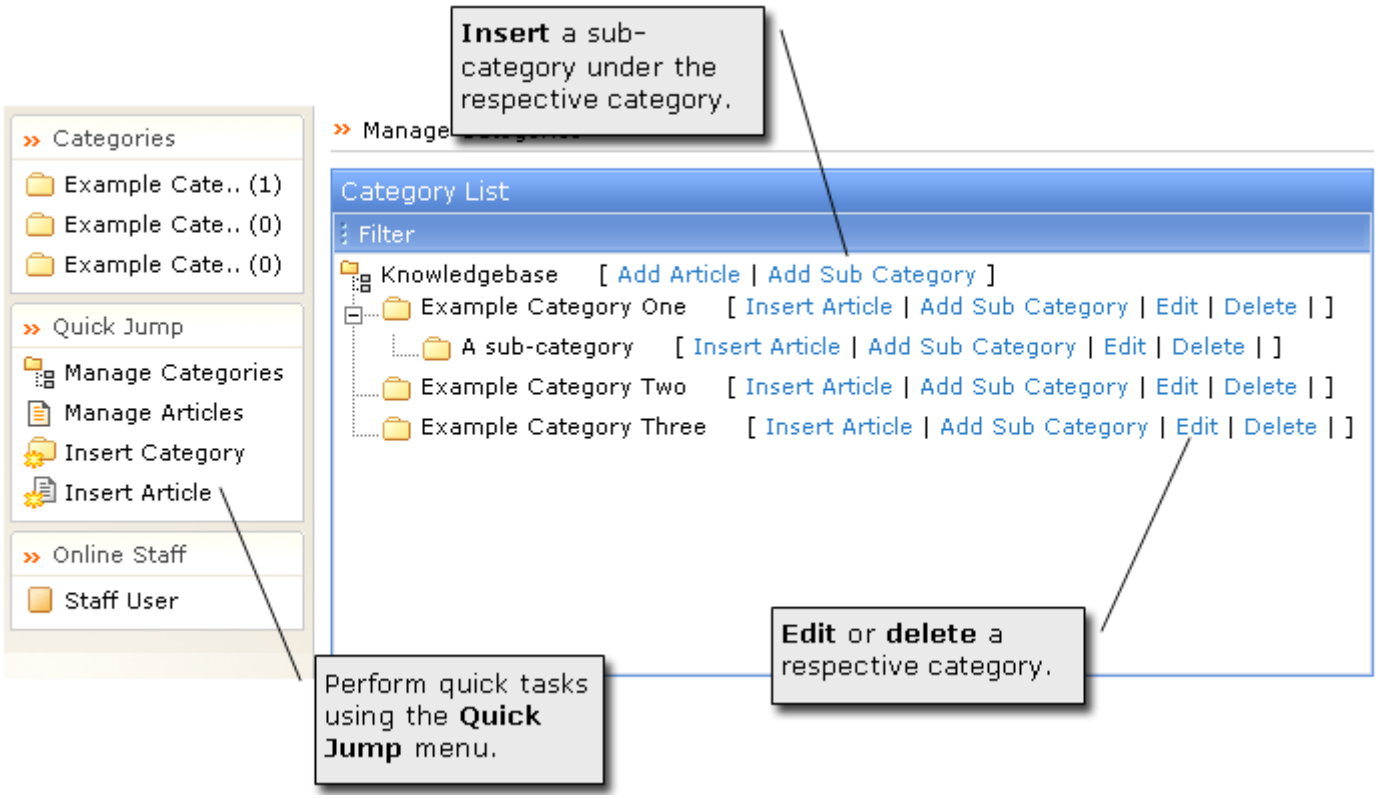
To view the knowledgebase article categories:

1. Open **Knowledgebase** on the navigation menu bar, as shown below.



2. Click on **Manage Categories**.

You will be presented with a list of all knowledgebase categories and subcategories within the database, as shown below.


Insert a sub-category under the respective category.
Categories
Example Cate.. (1)
Example Cate.. (0)
Example Cate.. (0)
Quick Jump
Manage Categories
Manage Articles
Insert Category
Insert Article
Online Staff
Staff User
Category List
Filter
Knowledgebase [Add Article | Add Sub Category]
Example Category One [Insert Article | Add Sub Category | Edit | Delete |]
A sub-category [Insert Article | Add Sub Category | Edit | Delete |]
Example Category Two [Insert Article | Add Sub Category | Edit | Delete |]
Example Category Three [Insert Article | Add Sub Category | Edit | Delete |]
Edit or delete a respective category.
Perform quick tasks using the Quick Jump menu.

To **edit** a category, click on the corresponding edit link.

Refer to the knowledgebase category fields section for documentation on the required fields for a new knowledgebase category

Creating a knowledgebase category

To create a new knowledgebase category:

1. Open **Knowledgebase** on the navigation menu bar, as shown below.

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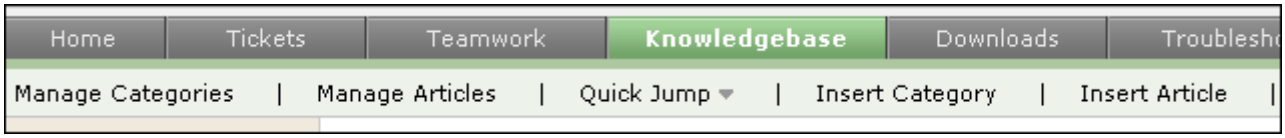

2. Click on **Insert Category**.

Refer to the knowledgebase category fields section for documentation on the required fields for a new knowledgebase category.

Knowledgebase category fields

Category Details
Category Title
Enter the Knowledgebase Category Title.
Display Order
Enter the Display Order for this Category. All Items are sorted in Ascending Order.
5
Parent Category
Select the Parent Category for this Category
Parent Category
Category Type
Select the Category Type. Public Categories are visible to both Staff Members and Clients. Private Categories are visible to only Staff Members.
Public
Private
Template Groups
Select the Template Groups to which this Knowledgebase Category will be assigned. This Category will only appear under the selected Template Groups.
Customize...
Insert Category

Category Details

- **Category Title** – the title of the new category.
- **Display Order** – categories are listed within the **client support interface** according to their display order.
- **Parent Category** – if the category is to be a subcategory of another, select it here.
- **Category Type** – if set to **public**, both staff users and client users will be able to view the category and articles under it. If set to **private**, the category will only be viewable from within the **staff control panel** by staff users.
- **Template Groups** – if multiple template groups are used, this category can be set to only display in one or more of them. Click on the **Customize** button to list the available templates.

Click on the **Insert** button to create the new category.

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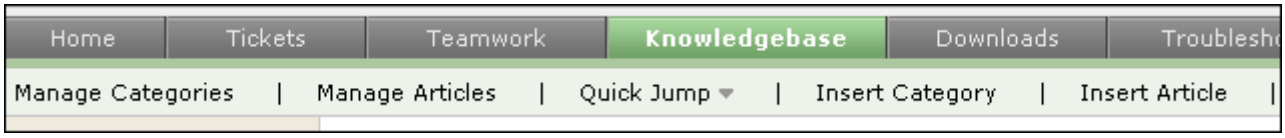
Managing knowledgebase articles

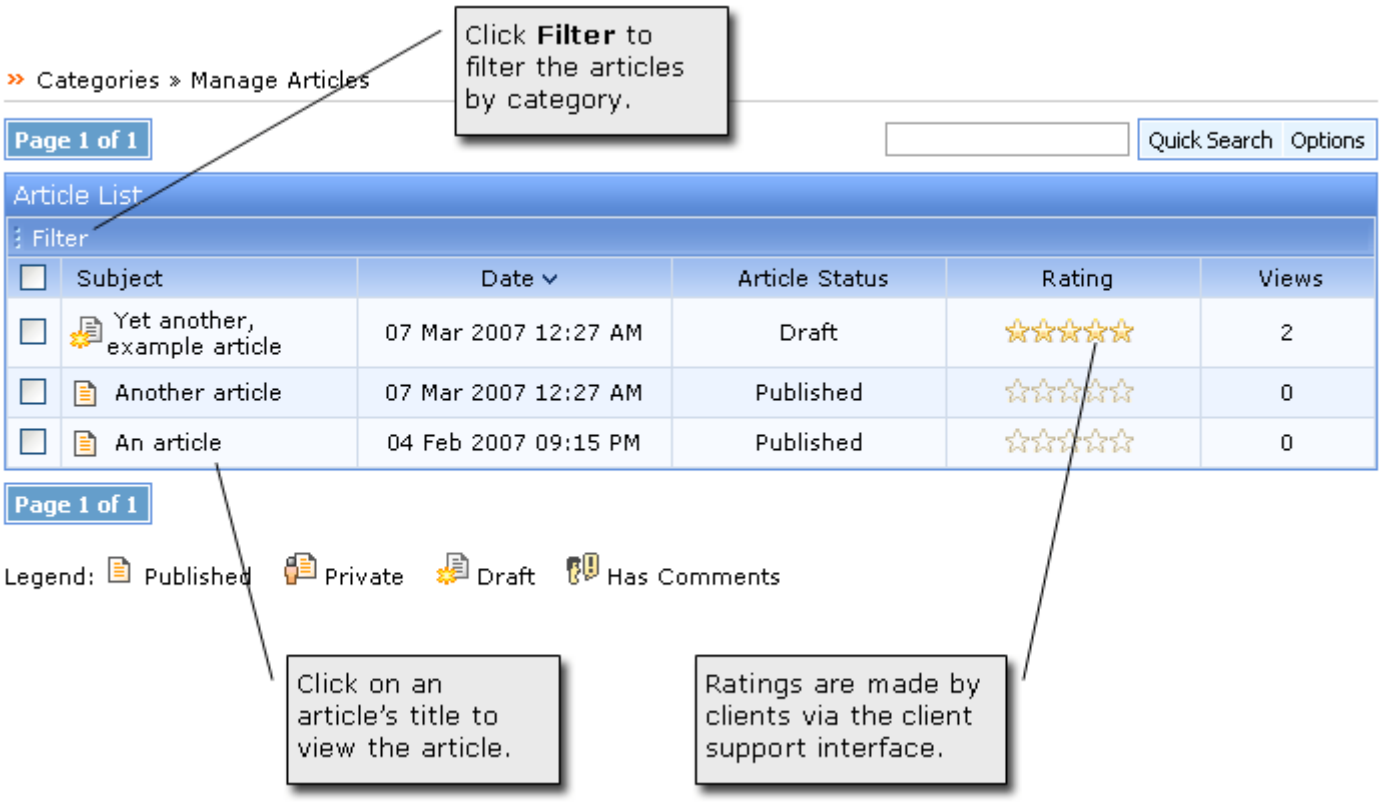
To view the knowledgebase articles:

1. Open **Knowledgebase** on the navigation menu bar, as shown below.



2. Click on **Manage Articles**.

You will be presented with a list of all knowledgebase articles stored in the database across all categories, as shown below.



Selecting multiple articles (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, articles can be mass-deleted. Under the **Advanced Search** tab, articles can be searched for by title or contents. Under the **Settings** tab, the number of articles shown per page (if there are many) can be limited.

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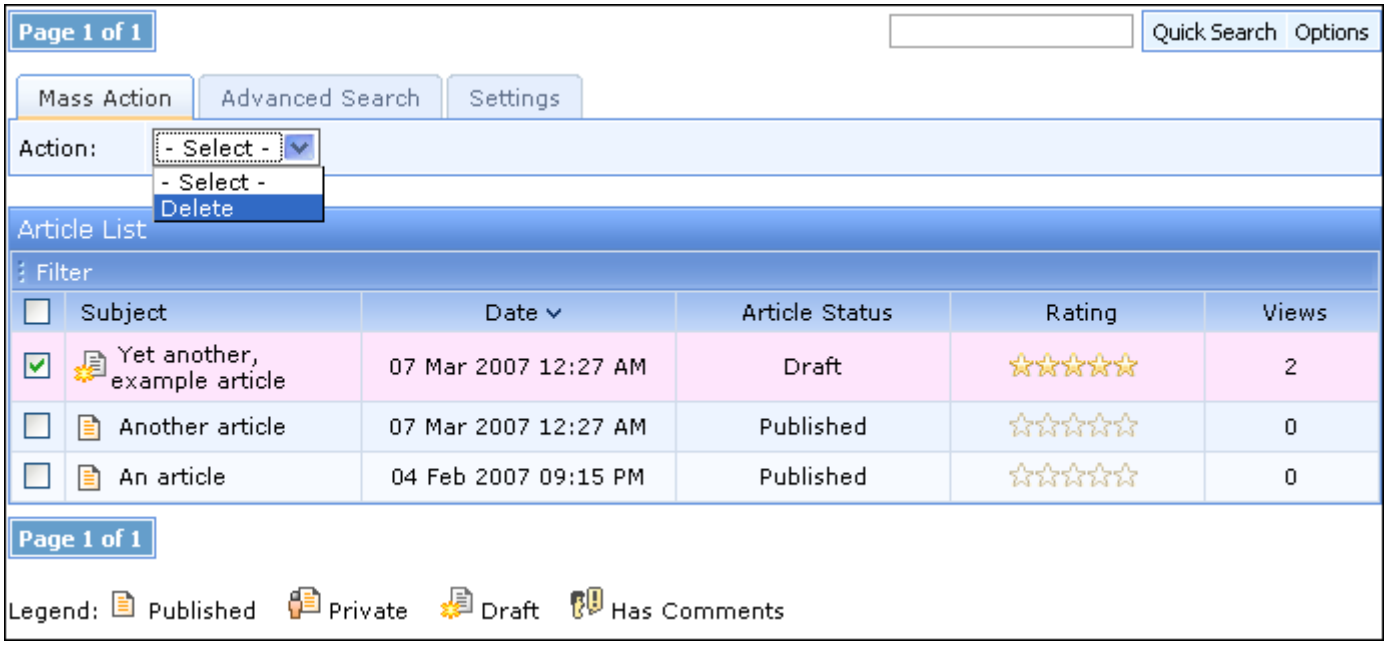
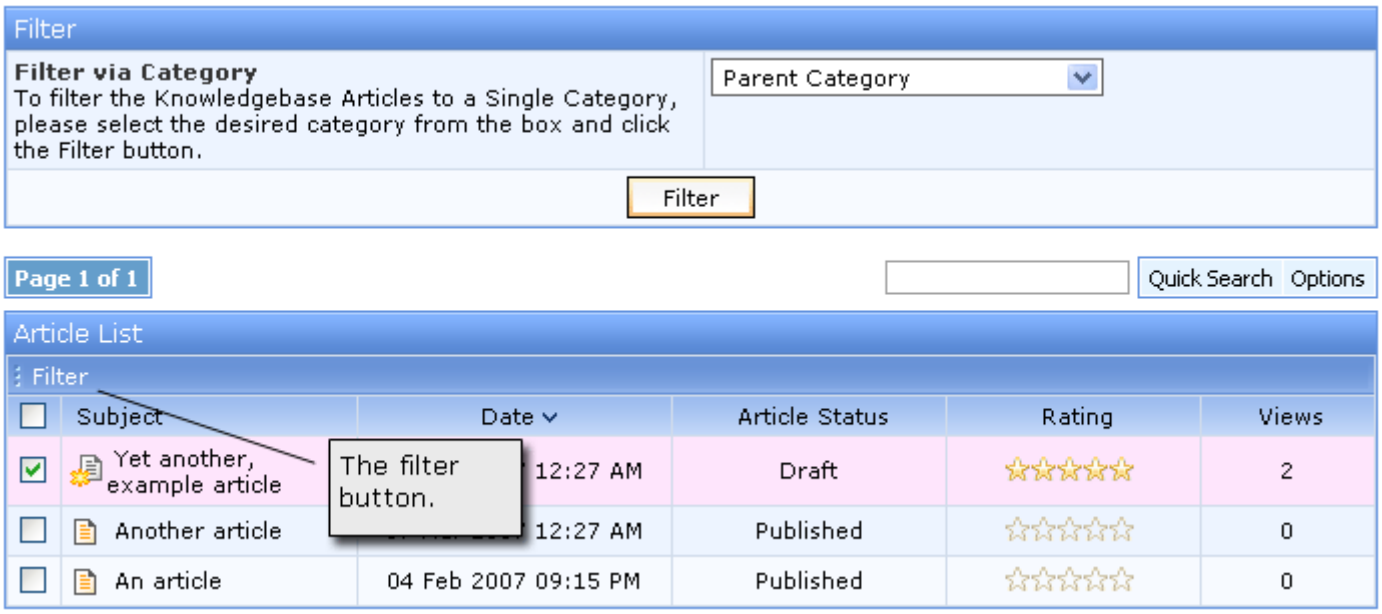


To view and **edit** an article, click on the article's title.

Refer to the knowledgebase article fields section for documentation on the required fields for a knowledgebase article.

Clicking on the **Filter** button allows you to filter the article list by **category**, as shown below.



Create a new knowledgebase article

To create a new knowledgebase article:

1. Open **Knowledgebase** on the navigation menu bar, as shown below.

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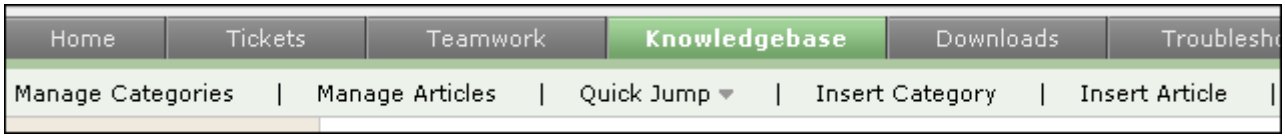
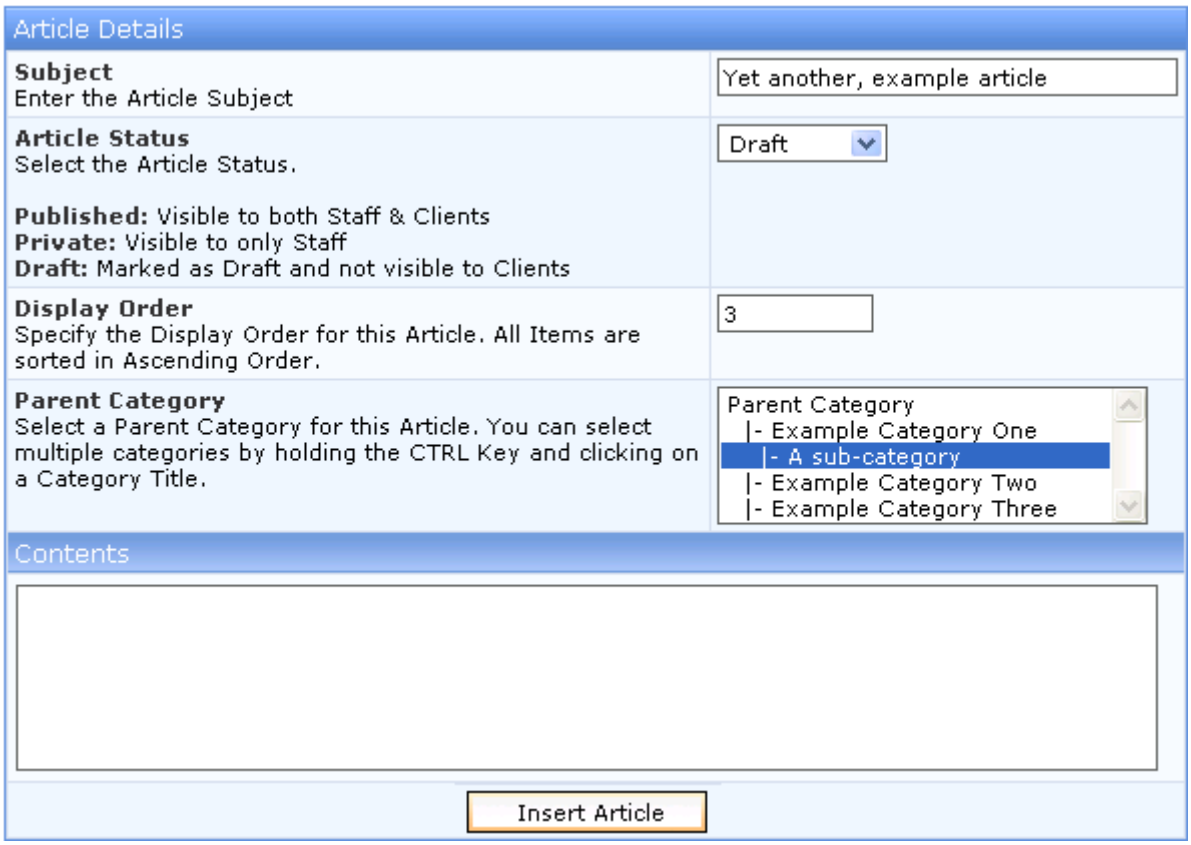


2. Click on **Insert Article**.

Refer to the knowledgebase article fields section for documentation on the required fields for a new knowledgebase article.

Knowledgebase article fields


Article Details
Subject
Enter the Article Subject
Yet another, example article
Article Status
Select the Article Status.
Published: Visible to both Staff & Clients
Private: Visible to only Staff
Draft: Marked as Draft and not visible to Clients
Draft
Display Order
Specify the Display Order for this Article. All Items are sorted in Ascending Order.
3
Parent Category
Select a Parent Category for this Article. You can select multiple categories by holding the CTRL Key and clicking on a Category Title.
Parent Category
|- Example Category One
|- A sub-category
|- Example Category Two
|- Example Category Three
Contents
Insert Article

Article Details

- **Subject** – the title of the article.
- **Article Status** – if set to **published**, the article will become visible to client users via the **client support interface**. If set to **private**, the article will be visible only to staff users via the **staff control panel**. If set to **draft**, the article will not be visible to client users but will still be editable by staff users.
- **Display Order** – the display order of the article. Articles are listed within categories according to their display order.
- **Parent Category** – if the article is to be placed under a category, it is set here.
- **Article Contents** – the contents of the article. HTML is allowed here**.**

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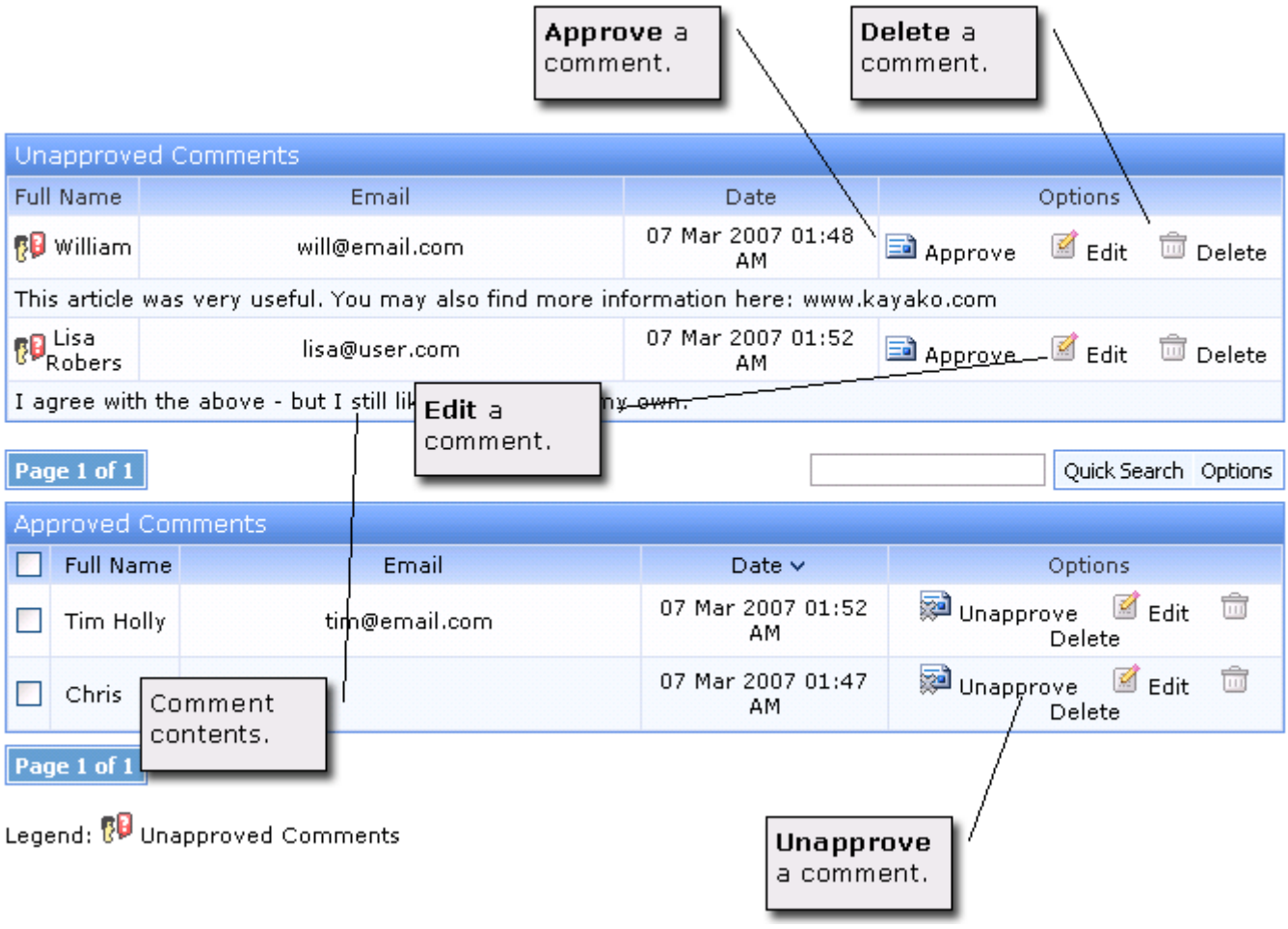
Viewing and moderating user comments

To view and moderate user comments:

1. Open **Knowledgebase** on the navigation menu bar, as shown below.

2. Click on **Comments**.

Per configuration in the **administrator control panel**, comments may require **approval** by a staff user before they are displayed publicly via the **client support interface**.



Selecting multiple comments (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, comments can be mass-deleted. Under the **Advanced Search** tab, comments can be searched for by title, writer or by their contents. Under the **Settings** tab, the number of comments shown per page (if there are many) can be limited.

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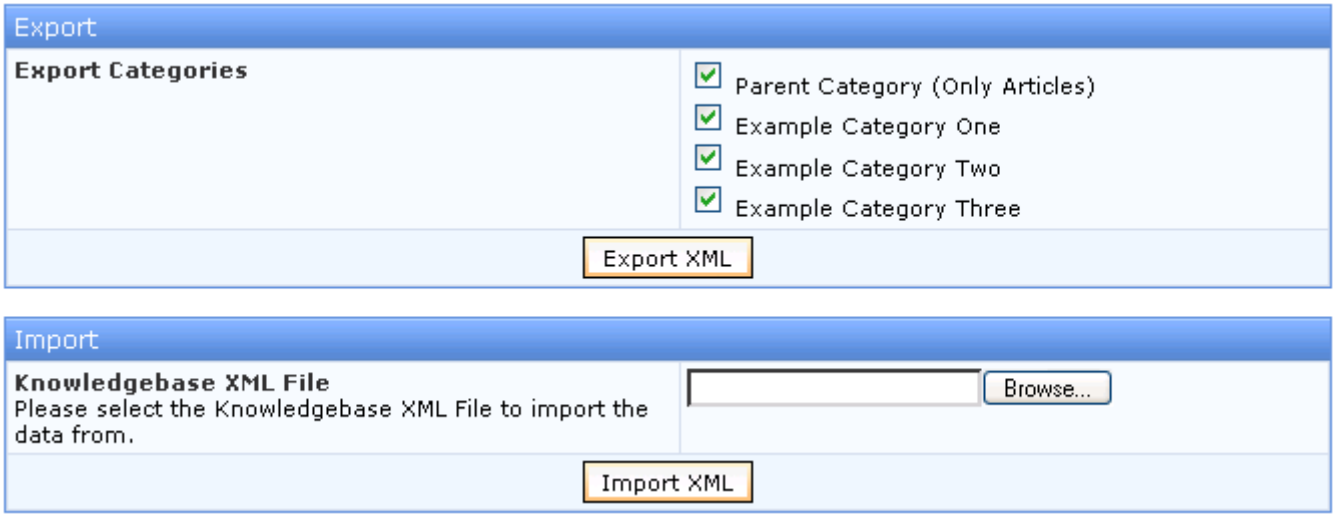
Importing and exporting articles

To import or export knowledgebase XML files:

1. Open **Knowledgebase** on the navigation menu bar, as shown below.

2. Click on **Import/Export**.

The import and export features of the knowledgebase allow you to export articles by category, and similarly import XML files containing knowledgebase categories and articles, as shown below.



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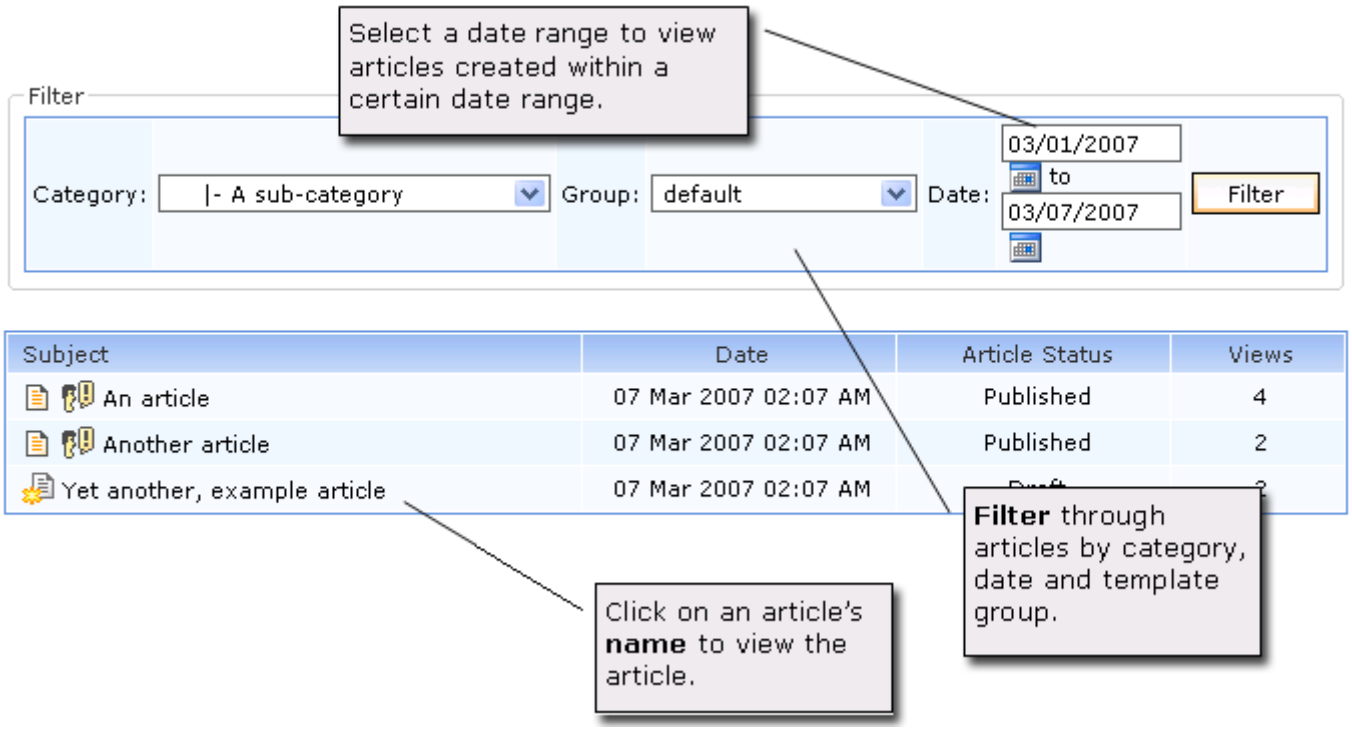
Knowledgebase reports

To view knowledgebase related reports:

1. Open **Knowledgebase** on the navigation menu bar, as shown below.

2. Open the **Reports** menu.
3. Click on the appropriate report.

The report features of the knowledgebase allow you to view which articles are the most **popular**, how articles are being **rated** by client users and which articles are **commented** on by client users. An example of the **Popular Articles** report is shown below.



Click on the calendar icon to open the date selector.

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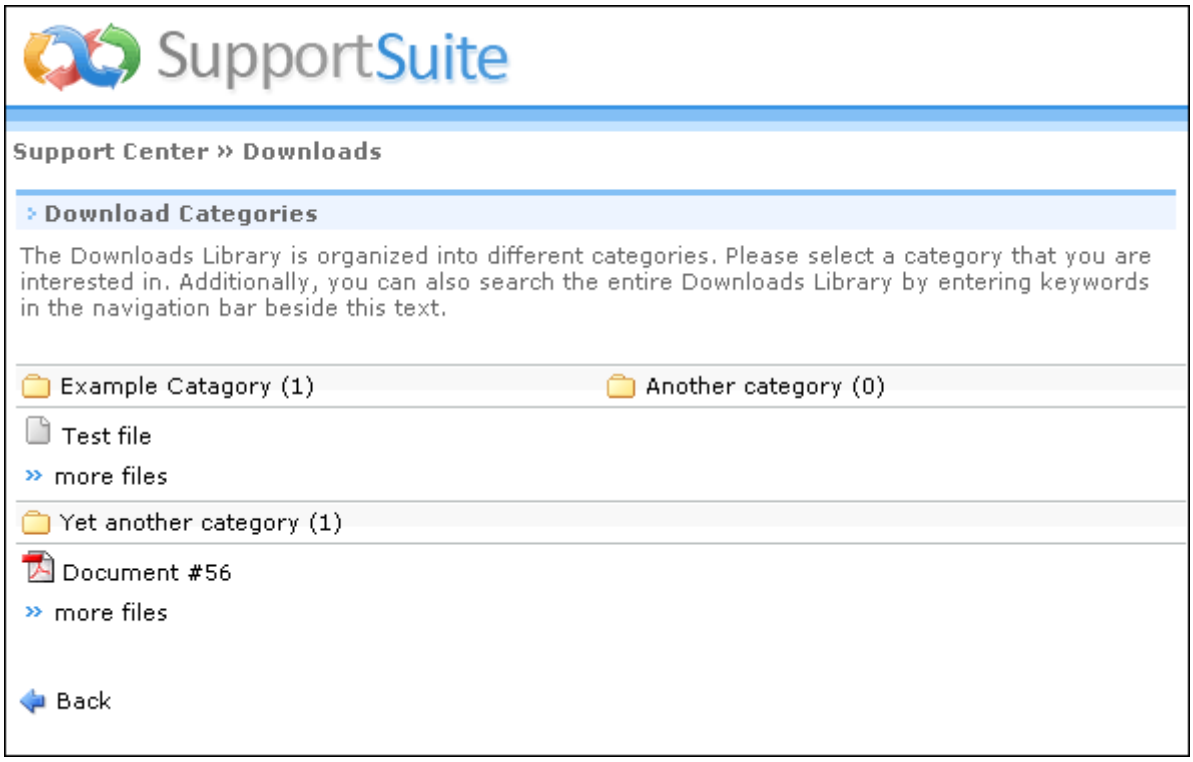
Downloads

The **downloads** module of SupportSuite is a categorized file repository managed from within the **staff control panel**, allowing clients to download files from within the **client support interface**, as shown below.


SupportSuite
Support Center » Downloads
Download Categories
The Downloads Library is organized into different categories. Please select a category that you are interested in. Additionally, you can also search the entire Downloads Library by entering keywords in the navigation bar beside this text.
Example Catagory (1)
Another category (0)
Test file
more files
Yet another category (1)
Document #56
more files
Back

The files for download can be uploaded from your computer or linked to, if uploaded elsewhere. Files are categorized and can be password protected – meaning a client user must enter a password before being able to download a file.

As shown below, a client can view all files within a category.

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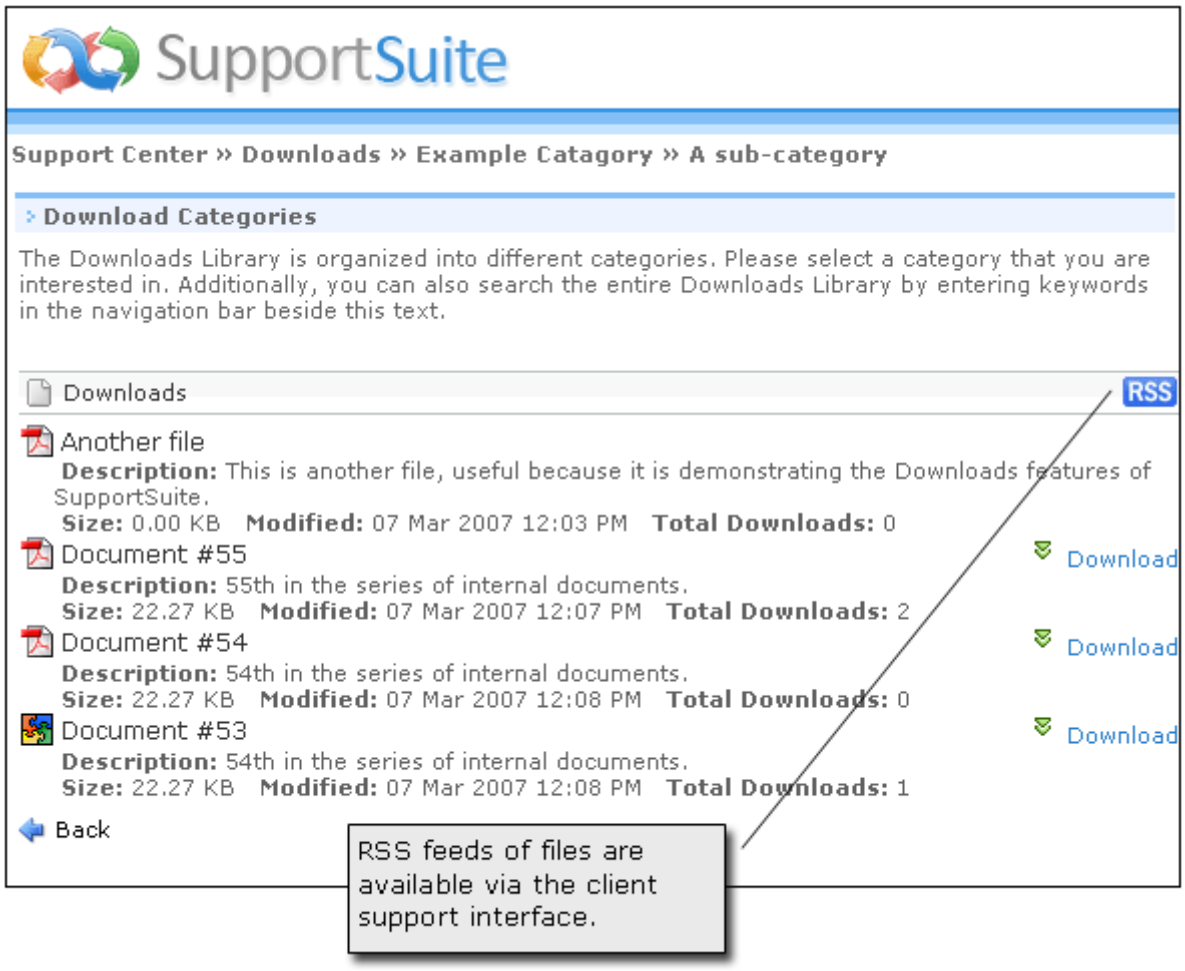
SupportSuite
Support Center » Downloads » Example Catagory » A sub-category
Download Categories
The Downloads Library is organized into different categories. Please select a category that you are interested in. Additionally, you can also search the entire Downloads Library by entering keywords in the navigation bar beside this text.
Downloads
RSS
Another file
Description: This is another file, useful because it is demonstrating the Downloads features of SupportSuite.
Size: 0.00 KB Modified: 07 Mar 2007 12:03 PM Total Downloads: 0
Document #55
Description: 55th in the series of internal documents.
Size: 22.27 KB Modified: 07 Mar 2007 12:07 PM Total Downloads: 2
Download
Document #54
Description: 54th in the series of internal documents.
Size: 22.27 KB Modified: 07 Mar 2007 12:08 PM Total Downloads: 0
Download
Document #53
Description: 54th in the series of internal documents.
Size: 22.27 KB Modified: 07 Mar 2007 12:08 PM Total Downloads: 1
Download
Back
RSS feeds of files are available via the client support interface.

Downloads can also be **commented** on by users. Per configuration within the **administrator control panel**, comments can require approval by a staff user before they are made visible to the public.

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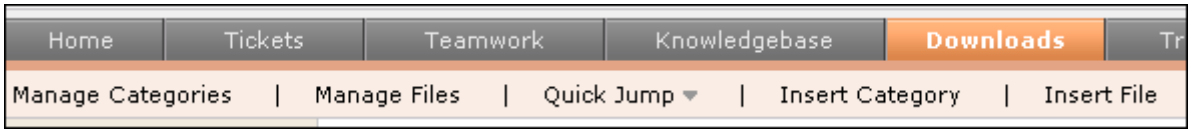
Managing downloads categories

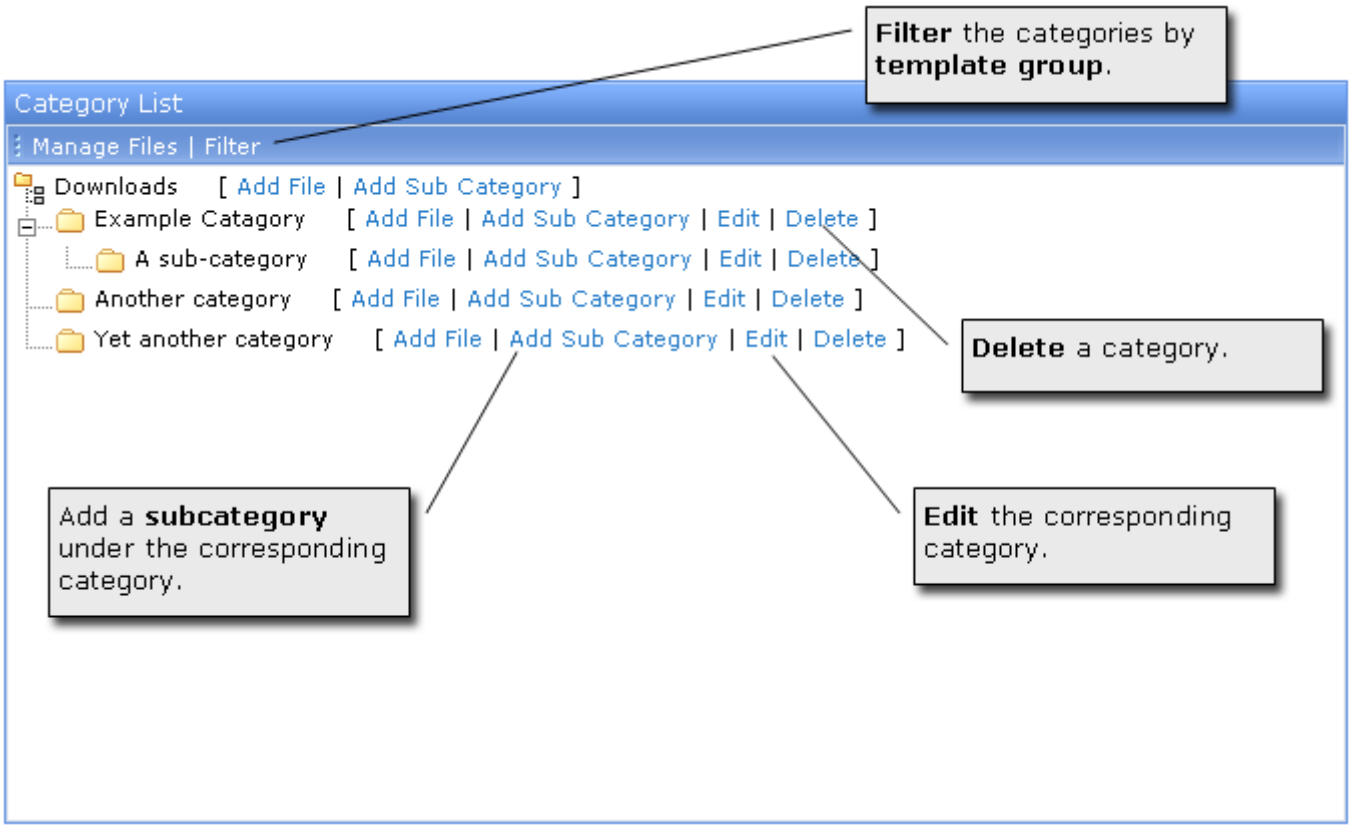
To view and manage downloads categories:

1. Open **Downloads** on the navigation menu bar, as shown below.



2. Click on **Manage Categories**.

You will be presented with a list of all the file categories stored in the database, as shown below.


Filter the categories by template group.
Category List
Manage Files | Filter
Downloads [Add File | Add Sub Category]
Example Catagory [Add File | Add Sub Category | Edit | Delete]
A sub-category [Add File | Add Sub Category | Edit | Delete]
Another category [Add File | Add Sub Category | Edit | Delete]
Yet another category [Add File | Add Sub Category | Edit | Delete]
Delete a category.
Add a subcategory under the corresponding category.
Edit the corresponding category.

To edit a category, click on the **edit** link (as indicated to above). Refer to downloads category fields for documentation on the required fields for a downloads category.

Creating a downloads category

To create a new files category:

1. Open **Downloads** on the navigation menu bar, as shown below.

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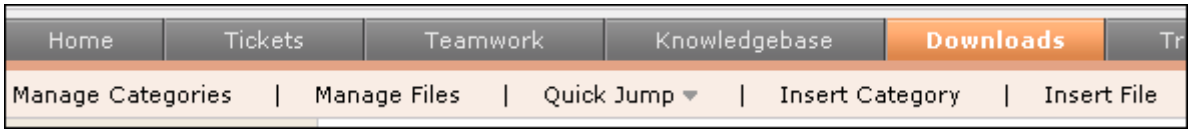
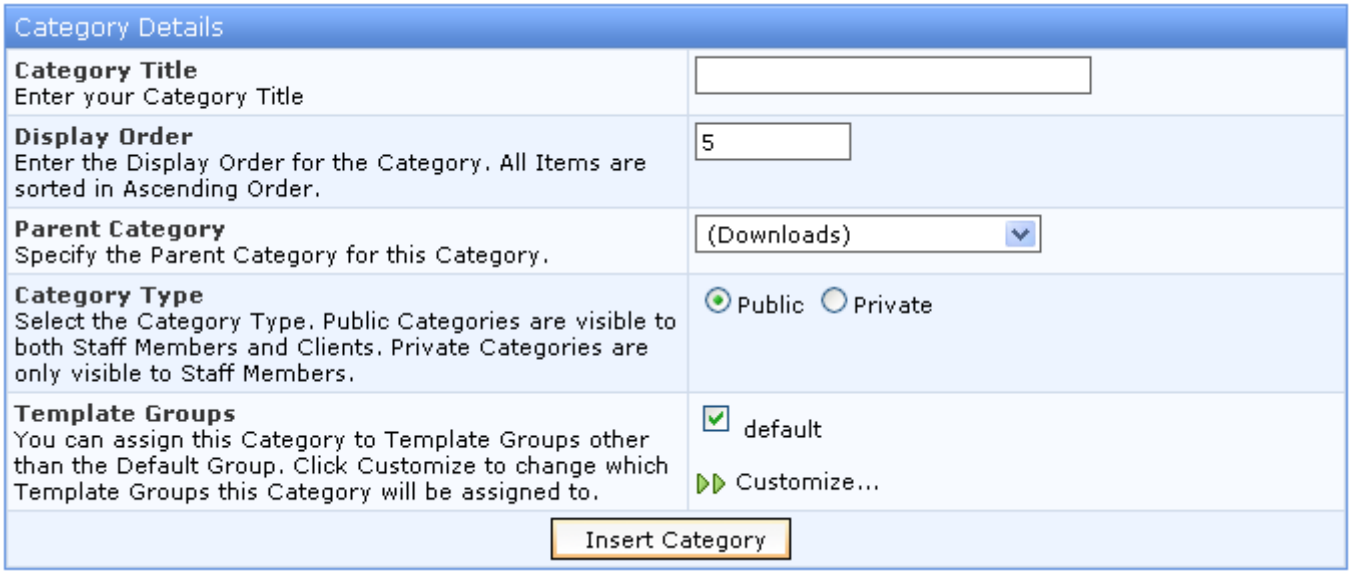


2. Click on **Insert Category**.

Refer to downloads category fields for documentation on the required fields for a downloads category.

Downloads category fields


Category Details
Category Title
Enter your Category Title
Display Order
Enter the Display Order for the Category. All Items are sorted in Ascending Order.
5
Parent Category
Specify the Parent Category for this Category.
(Downloads)
Category Type
Select the Category Type. Public Categories are visible to both Staff Members and Clients. Private Categories are only visible to Staff Members.
Public
Private
Template Groups
You can assign this Category to Template Groups other than the Default Group. Click Customize to change which Template Groups this Category will be assigned to.
default
Customize...
Insert Category

Category Details

- **Category Title** – the title of the new category.
- **Display Order** – categories are listed within the **client support interface** according to their display order.
- **Parent Category** – if the category is to be a subcategory of another, select it here.
- **Category Type** – if set to **public**, both staff users and client users will be able to view the category and files under it. If set to **private**, the category will only be viewable from within the **staff control panel** by staff users.
- **Template Groups** – if multiple template groups are used, this category can be set to only display in one or more of them. Click on the **Customize** button to list the available templates.

Click on the **Insert** button to create the new category.

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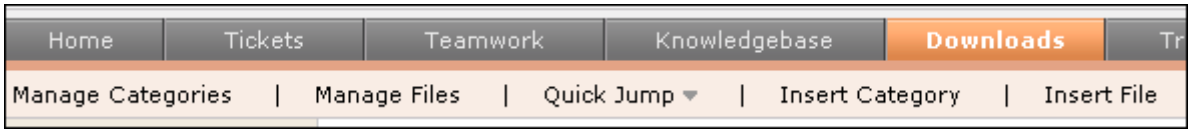
Managing downloads

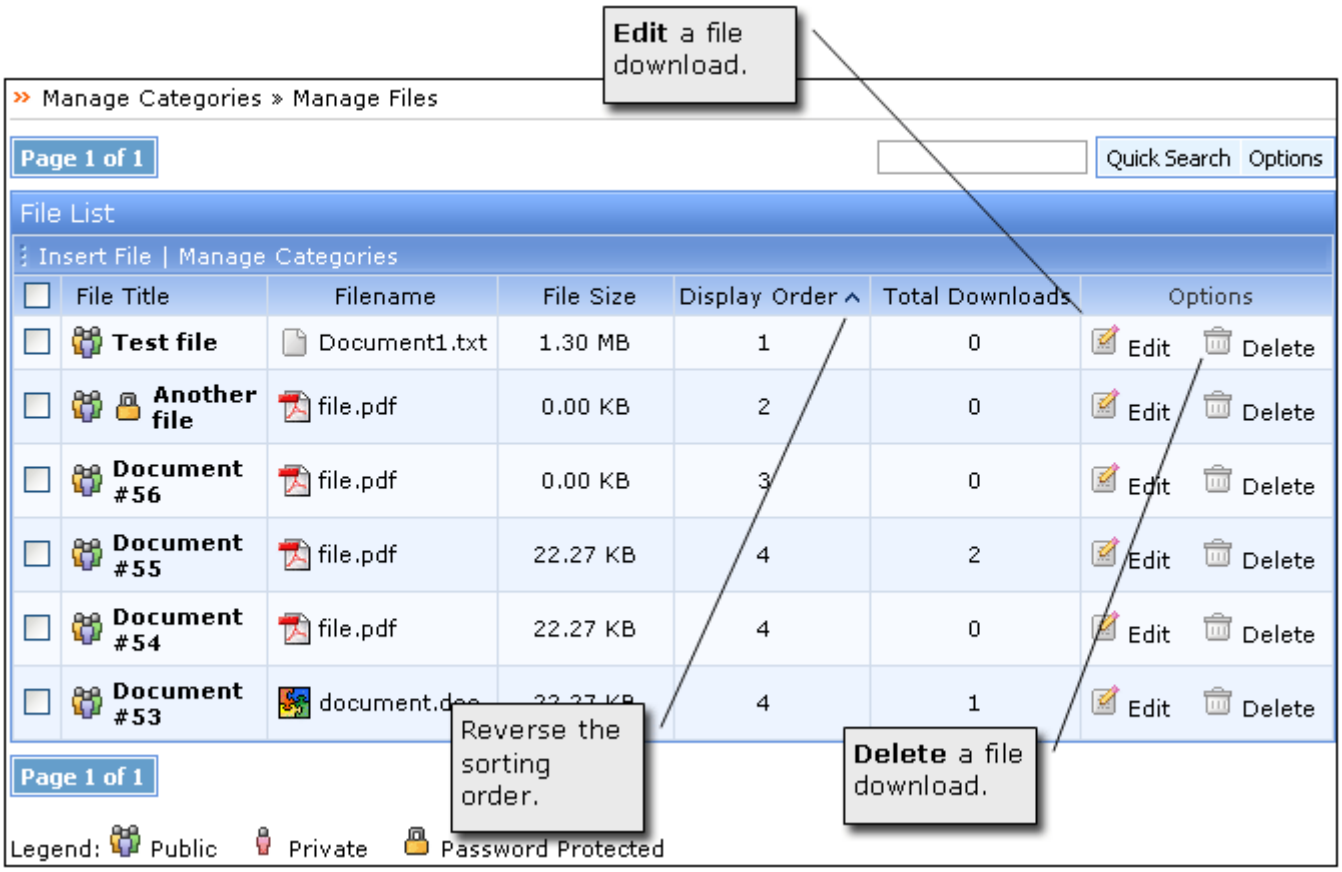
To view the files stored in the database:

1. Open **Downloads** on the navigation menu bar, as shown below.



2. Click on **Manage Files**.

You will be presented with a list of all files stored in the database across all categories, as shown below.



Selecting multiple files (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, files can be mass-deleted. Under the **Advanced Search** tab, files can be searched for by title or description. Under the **Settings** tab, the number of files shown per page (if there are many) can be limited.

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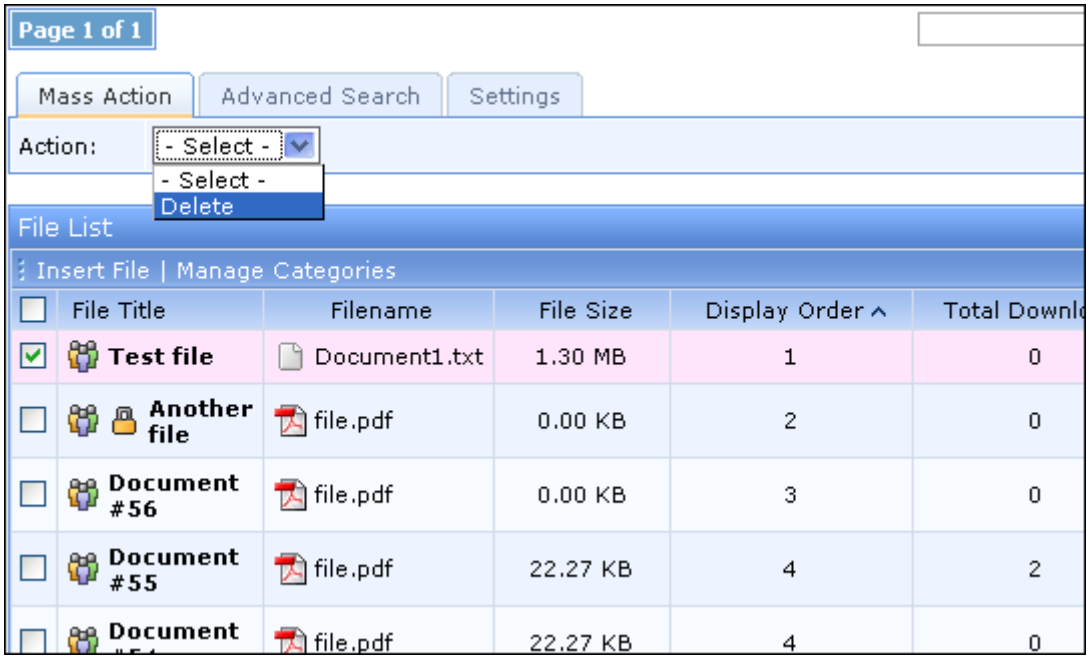
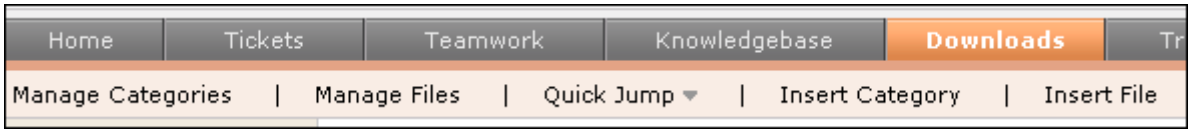


To view and edit a download, click on the respective download's title. Refer to the file fields section for documentation on the required fields for a new file.

Create a new file

To create a new download file:

1. Open **Downloads** on the navigation menu bar, as shown below.



2. Click on **Insert File**.

Refer to the file fields section for documentation on the required fields for a new file.

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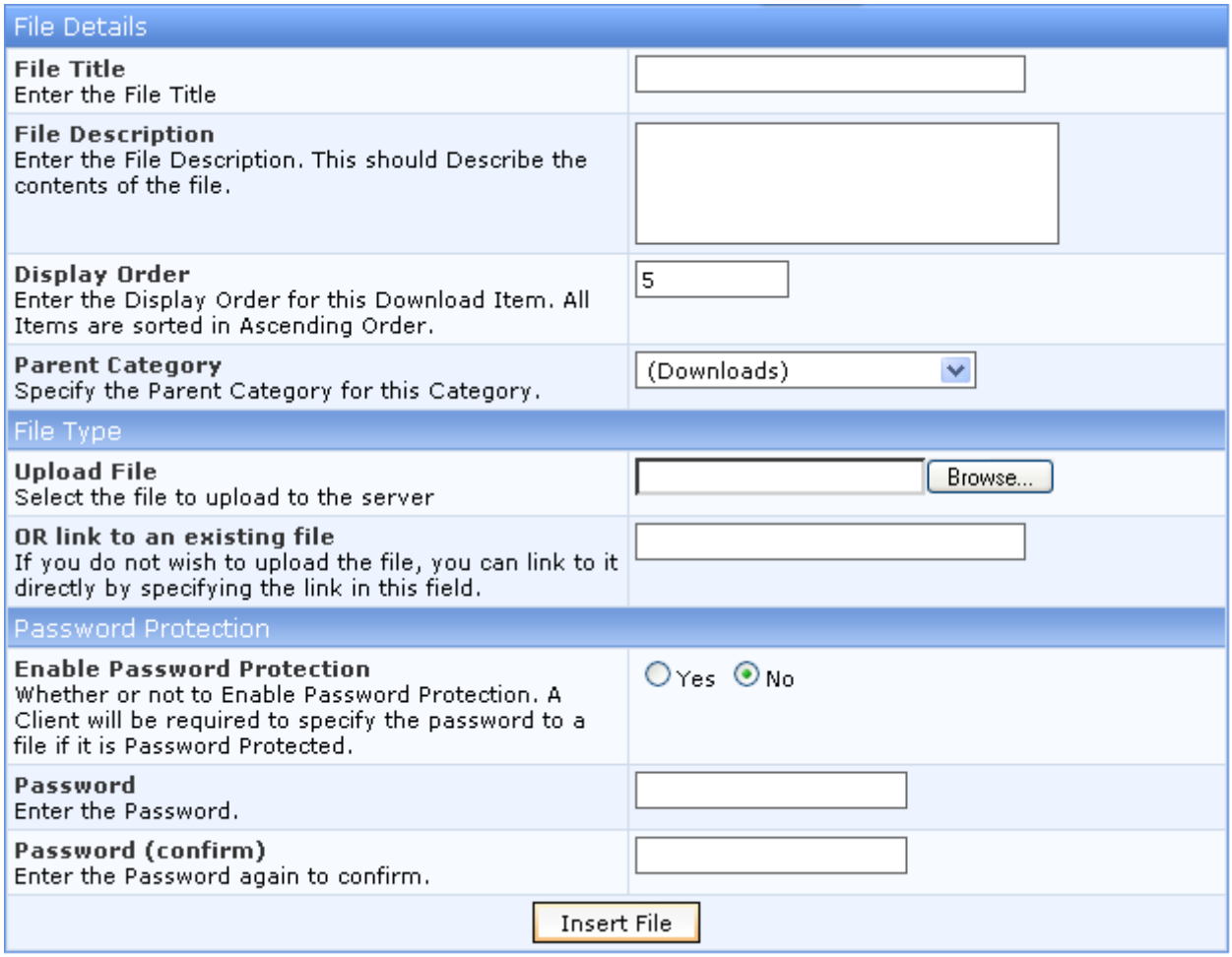
File fields


File Details
File Title
Enter the File Title
File Description
Enter the File Description. This should Describe the contents of the file.
Display Order
Enter the Display Order for this Download Item. All Items are sorted in Ascending Order.
5
Parent Category
Specify the Parent Category for this Category.
(Downloads)
File Type
Upload File
Select the file to upload to the server
Browse...
OR link to an existing file
If you do not wish to upload the file, you can link to it directly by specifying the link in this field.
Password Protection
Enable Password Protection
Whether or not to Enable Password Protection. A Client will be required to specify the password to a file if it is Password Protected.
Yes
No
Password
Enter the Password.
Password (confirm)
Enter the Password again to confirm.
Insert File

File Details

- **File Title** – the title of the file.
- **File Description** – a description of the file.
- **Display Order** – the display order of the file. Files are listed within categories according to their display order.
- **Parent Category** – if the file is to be placed under a category, it is set here.
- **Upload File** – if you are uploading the file directly to your SupportSuite installation, find the file on your hard disk here and select it.
  or
- **Link to an existing file** – you can link to an existing file (if you know the URL of the file) if it is already uploaded to a different location.
- **Enable Password Protection** – if you require your clients to enter a password before downloading a file, set this to **yes**. Otherwise, set to **no**.
- **Password** – to add a password or change the password of the file, enter the new password here.

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- **Password (confirm)** – confirm your password entry.

Click on the **Insert File** button to create the new file.

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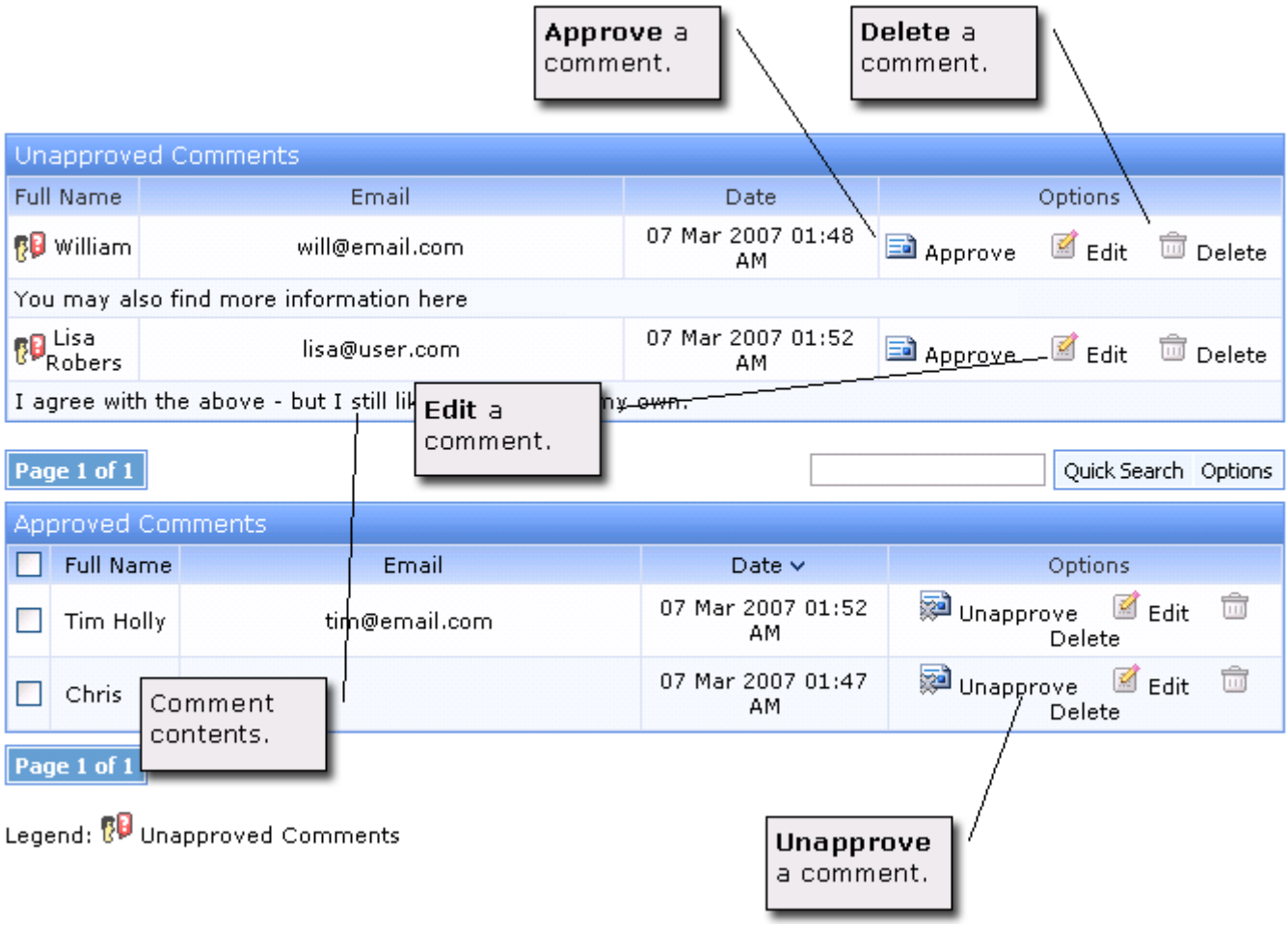
View and manage download comments

To view and moderate user comments:

1. Open **Downloads** on the navigation menu bar, as shown below.

2. Click on **Comments**.

Per configuration in the **administrator control panel**, comments may require **approval** by a staff user before they are displayed publicly via the **client support interface**.



Selecting multiple comments (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, approved comments can be mass-deleted and unapproved. Under the **Advanced Search** tab, comments can be searched for by title, writer or by their contents. Under the **Settings** tab, the number of comments shown per page (if there are many) can be limited.

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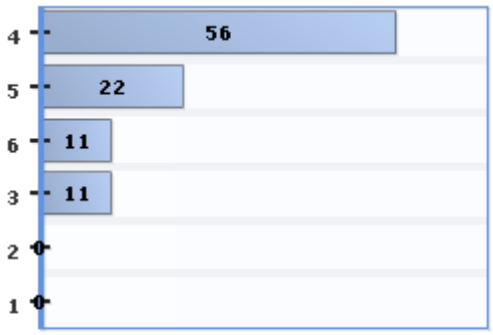
Download reports

To view download related reports:

1. Open **Downloads** on the navigation menu bar, as shown below.

2. Open the **Reports** menu.
3. Click on the appropriate report.

The report features of the downloads allow you to view which files are the most **popular** and have been downloaded the most times.



ID	File Title	Filename	File Size	Downloads
4	**Document #55**	file.pdf	22.27 KB	5
5	**Document #54**	file.pdf	22.27 KB	2
3	**Document #56**	file.pdf	0.00 KB	1
6	**Document #53**	document.doc	22.27 KB	1
1	**Test file**	Document1.txt	1.30 MB	0
2	**Another file**	file.pdf	0.00 KB	0

The graph shows the **IDs** of the files followed by their percentage share of all file downloads. The table to the right of the graph lists the files shown on the graph, their number of downloads and their respective file information.

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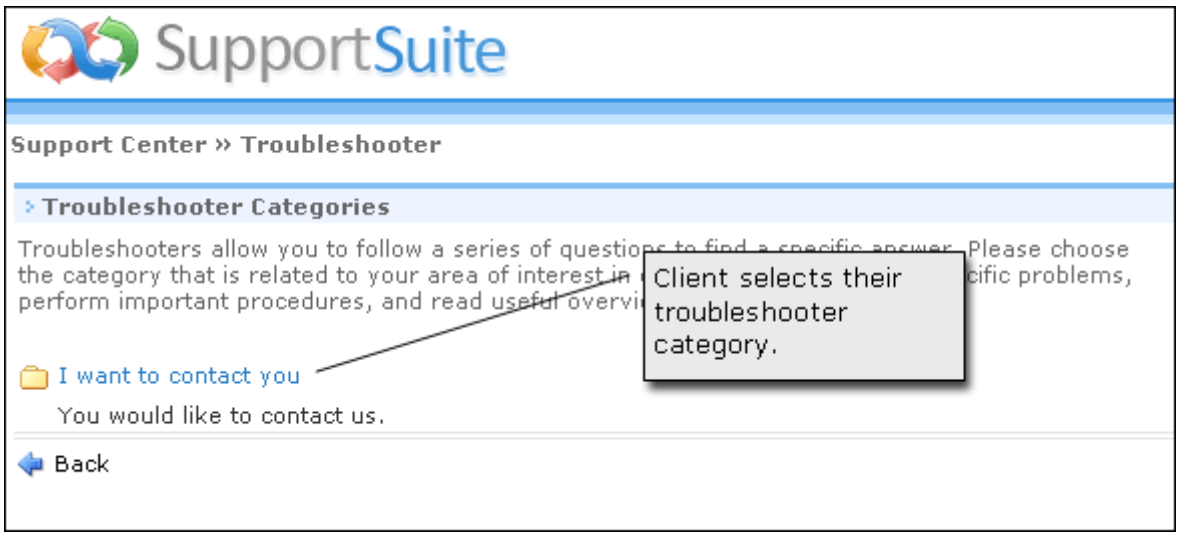
Troubleshooter

The **troubleshooter** offers clients step-by-step problem solving using a story-board of questions and answers, a series of static interviews helping the user resolve their issue.

For example:


SupportSuite
Support Center » Troubleshooter
Troubleshooter Categories
Troubleshooters allow you to follow a series of questions to find a specific answer. Please choose the category that is related to your area of interest in
cific problems, perform important procedures, and read useful overvi
Client selects their troubleshooter category.
I want to contact you
You would like to contact us.
Back

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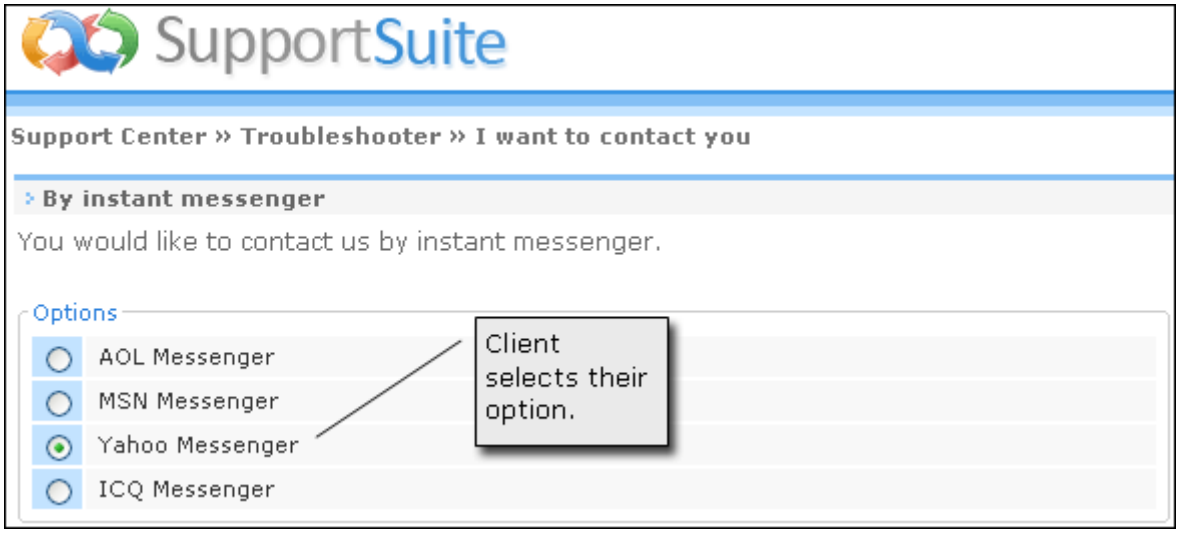

SupportSuite
Support Center » Troubleshooter » I want to contact you
Yahoo Messenger
You can contact us by adding the contact:
Yahoo! ID: company_support
To your messenger.
< Back
Start Over
Client ends up at their resolving article.

Trouble shooter categories and steps are managed from within the **staff control panel**.

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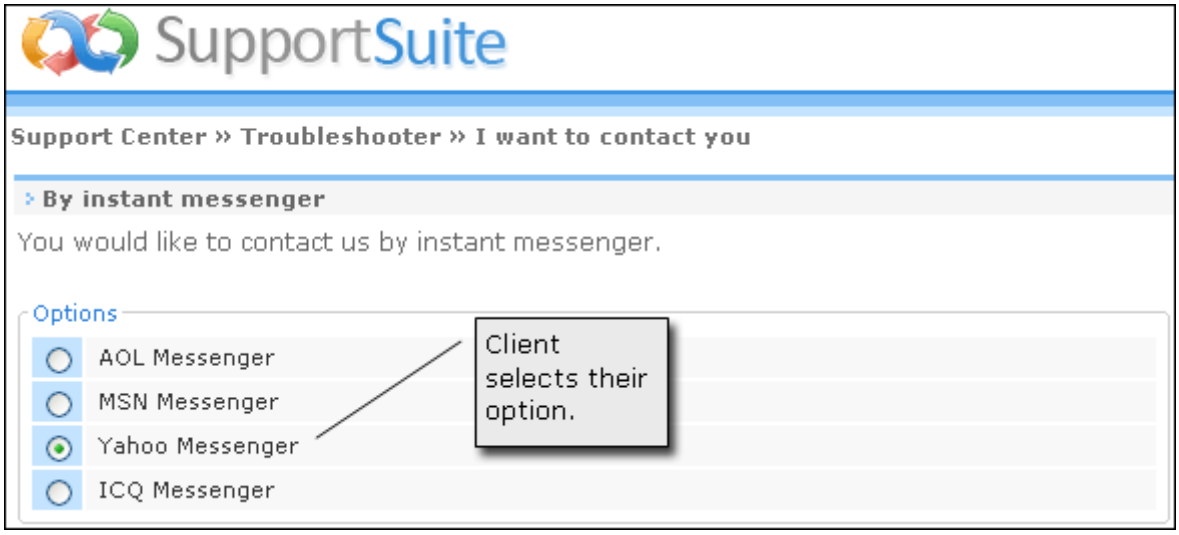
Building a troubleshooter

A troubleshooter **category** contains troubleshooter **steps**. Steps are arranged in a tree form, for example:



In the above two diagrams, the steps are ordered in the following way:

Category: I want to contact you

- **Step:** By e-mail
  - ...
- **Step:** By telephone
  - ...
- **Step:** By instant messenger
  - **Step:** AOL Messenger
  - **Step:** MSN Messenger
  - **Step:** Yahoo Messenger
  - **Step:** ICQ Messenger
- **Step:** By live chat
  - ...

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There is no limit to the number of steps and sub-steps that can be created for one troubleshooter.

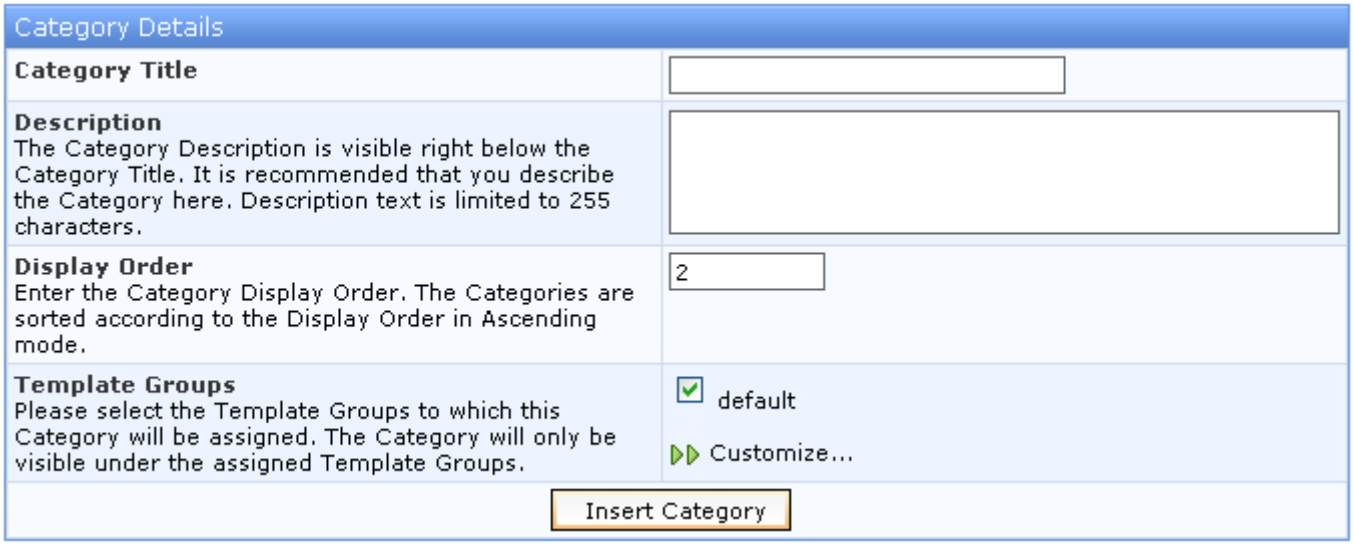
Create a troubleshooter category

The troubleshooter category is the "starting point" to a troubleshooter. To create a **troubleshooter category**:

1. Open **Troubleshooter** on the navigation menu bar, as shown below.

2. Click on **Insert Category**.

You will be presented with the insert category form, as shown below.


Category Details
Category Title
Description
The Category Description is visible right below the Category Title. It is recommended that you describe the Category here. Description text is limited to 255 characters.
Display Order
Enter the Category Display Order. The Categories are sorted according to the Display Order in Ascending mode.
2
Template Groups
Please select the Template Groups to which this Category will be assigned. The Category will only be visible under the assigned Template Groups.
default
Customize...
Insert Category

- **Category Title** – the title of the troubleshooter category. For example "My SSL certificate has expired" or "I cannot access my e-mail".
- **Description –** a short description of the category.
- **Display Order** – troubleshooter categories are ordered by their display order.
- **Template Groups** – if your SupportSuite installation has more than one template group configured, you can set which template groups this troubleshooter category will appear in.

Click on the **Insert Category** button to create the new troubleshooter category.

Managing troubleshooter steps and categories

To add **steps** to a troubleshooter category:

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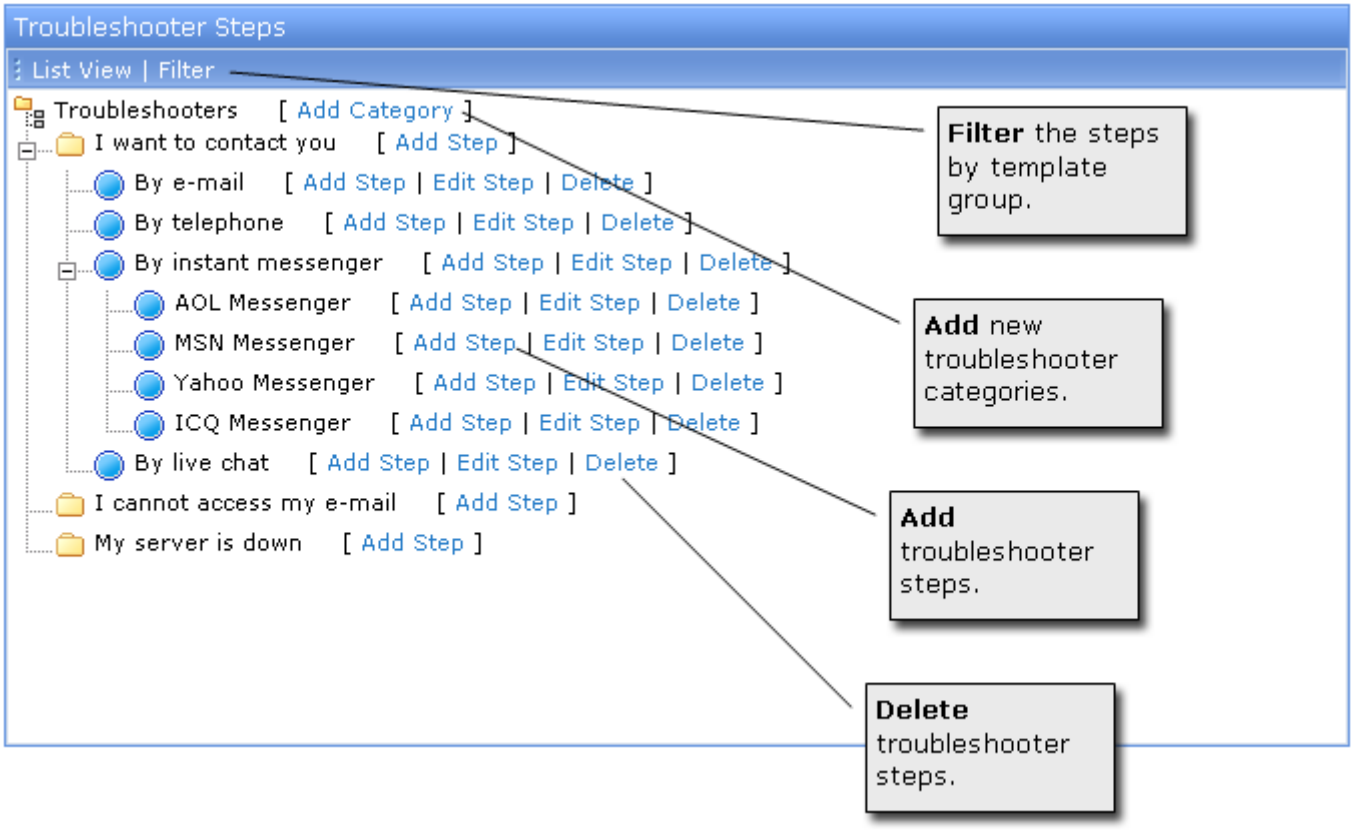
1. Open **Troubleshooter** on the navigation menu bar, as shown below.

2. Click on **Manage Steps**.

You will be presented with a list of all troubleshooter **categories** and their child **steps** in a tree form, as shown below.


Troubleshooter Steps
List View | Filter
Troubleshooters [Add Category]
I want to contact you [Add Step]
By e-mail [Add Step | Edit Step | Delete]
By telephone [Add Step | Edit Step | Delete]
By instant messenger [Add Step | Edit Step | Delete]
AOL Messenger [Add Step | Edit Step | Delete]
MSN Messenger [Add Step | Edit Step | Delete]
Yahoo Messenger [Add Step | Edit Step | Delete]
ICQ Messenger [Add Step | Edit Step | Delete]
By live chat [Add Step | Edit Step | Delete]
I cannot access my e-mail [Add Step]
My server is down [Add Step]
Filter the steps by template group.
Add new troubleshooter categories.
Add troubleshooter steps.
Delete troubleshooter steps.

Click on the category or step you wish to add a **child step** for. You will be presented with the add step form, as shown below.

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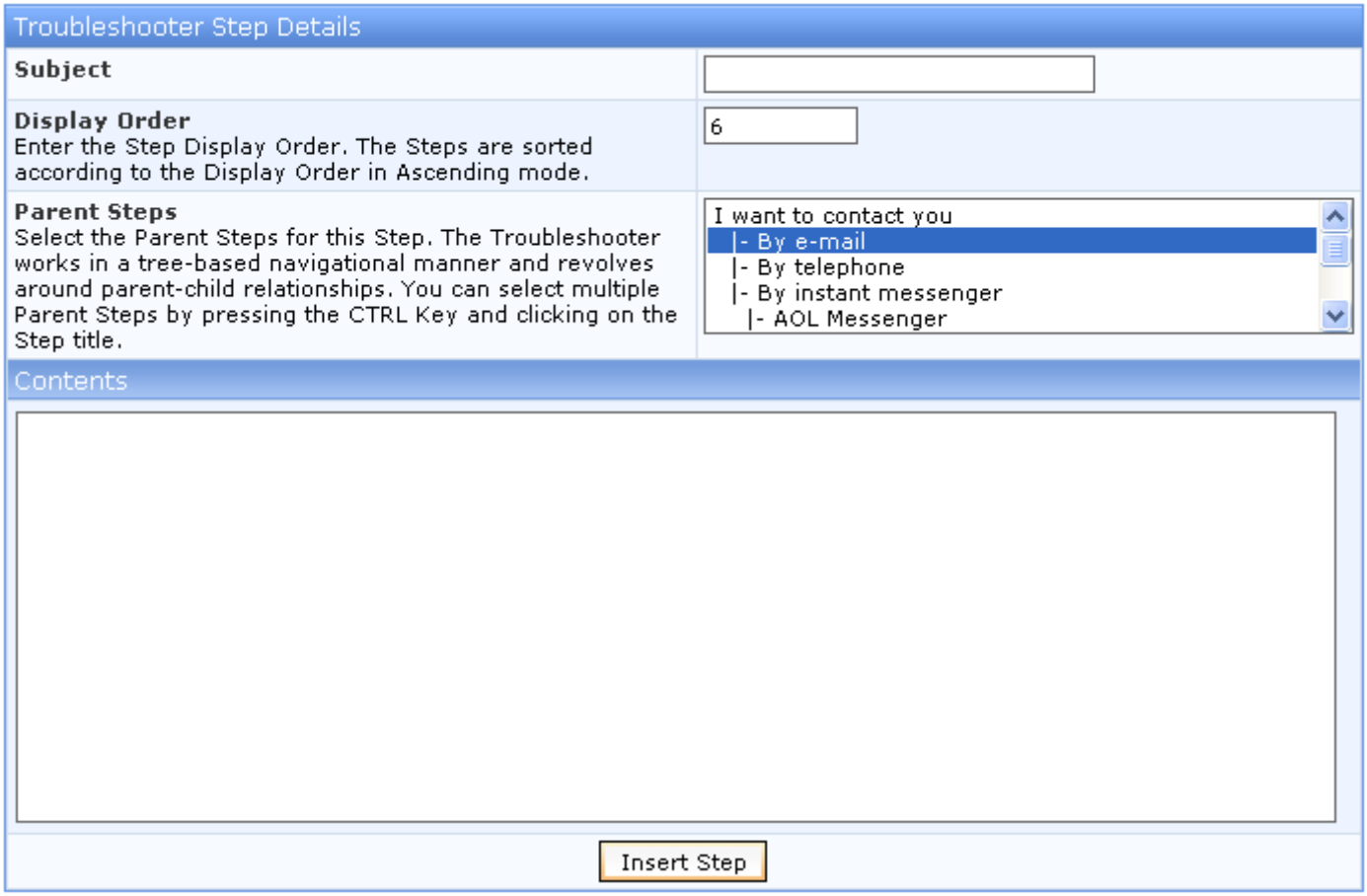
Troubleshooter Step Details
Subject
Display Order
Enter the Step Display Order. The Steps are sorted according to the Display Order in Ascending mode.
6
Parent Steps
Select the Parent Steps for this Step. The Troubleshooter works in a tree-based navigational manner and revolves around parent-child relationships. You can select multiple Parent Steps by pressing the CTRL Key and clicking on the Step title.
I want to contact you
|- By e-mail
|- By telephone
|- By instant messenger
|- AOL Messenger
Contents
Insert Step

- **Subject** – the title of the step.
- **Display Order** – steps are ordered by their display order.
- **Parent Steps** – a step can be added to **one or more** parent steps. Select them here.
- **Contents** – the contents of a step.

Click on the **Insert Step** button to add the new step.

How to terminate the troubleshooter steps

To "terminate" a troubleshooter, simply stop adding steps for that troubleshooter.

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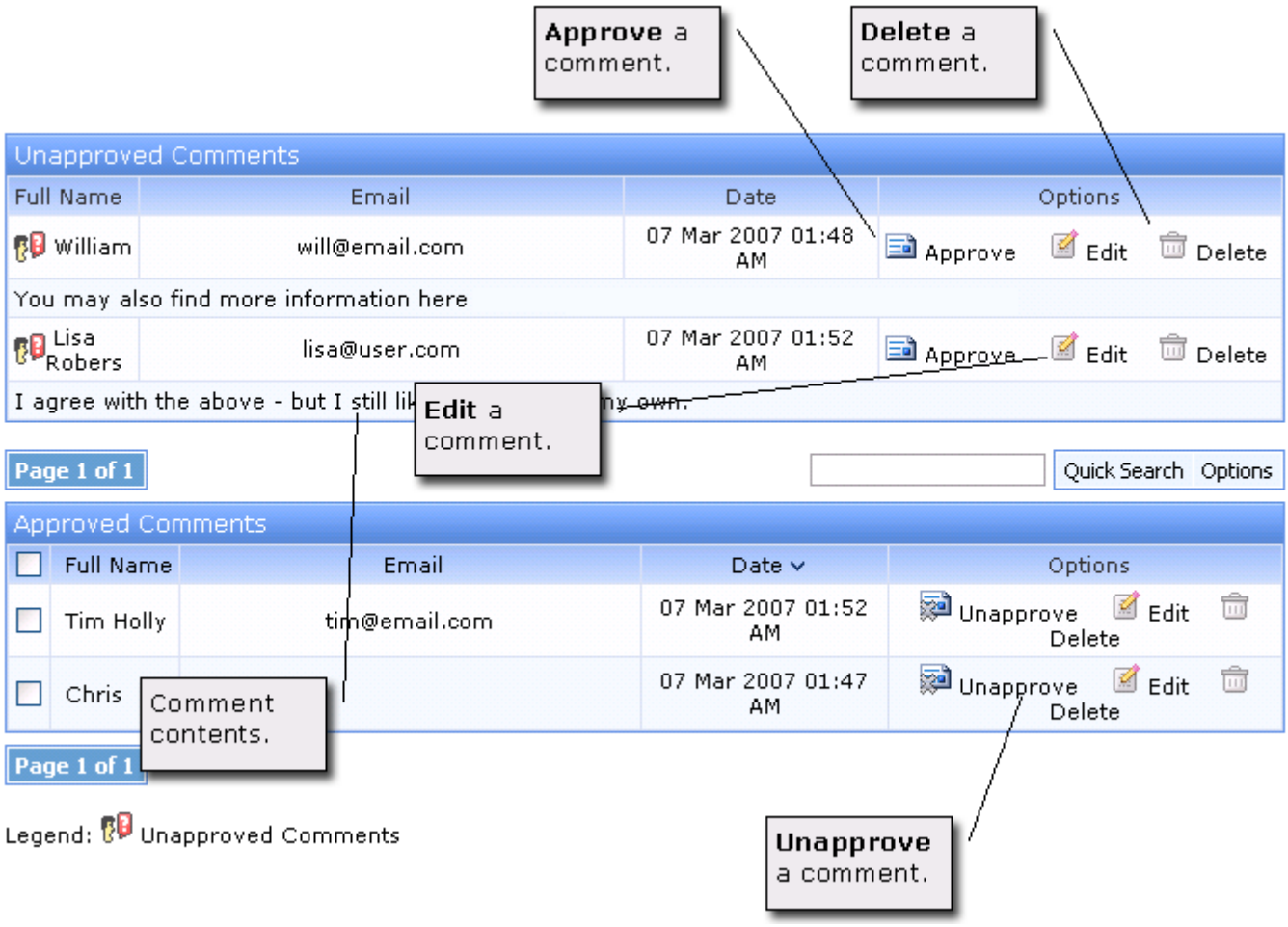
Viewing and managing troubleshooter comments

To view and moderate user comments:

1. Open **Troubleshooter** on the navigation menu bar, as shown below.

2. Click on **Comments**.

Per configuration in the **administrator control panel**, comments may require **approval** by a staff user before they are displayed publicly via the **client support interface**.



Selecting multiple comments (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, comments can be mass-deleted and mass-unapproved. Under the **Advanced Search** tab, comments can be searched for by title, writer or by their contents. Under the **Settings** tab, the number of comments shown per page (if there are many) can be limited.

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Importing and exporting troubleshooters

XML files containing troubleshooters can be exported and imported, to save hard copies of troubleshooters and move troubleshooter content between SupportSuite installations.

To import or export troubleshooter XML files:

1. Open **Troubleshooter** on the navigation menu bar, as shown below.

2. Click on **Import/Export**.

The import and export features of the troubleshooter allow you to export articles by category, and similarly import XML files containing troubleshooter steps and articles, as shown below.

Export
Troubleshooter Categories
Select the Troubleshooter Categories to Export. Only the Steps under the Selected Categories will be exported.
I want to contact you
I cannot access my e-mail
My server is down
Export XML
Import Troubleshooter
Import File
Please select the XML file to import
Browse...
Import XML

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Troubleshooter reports

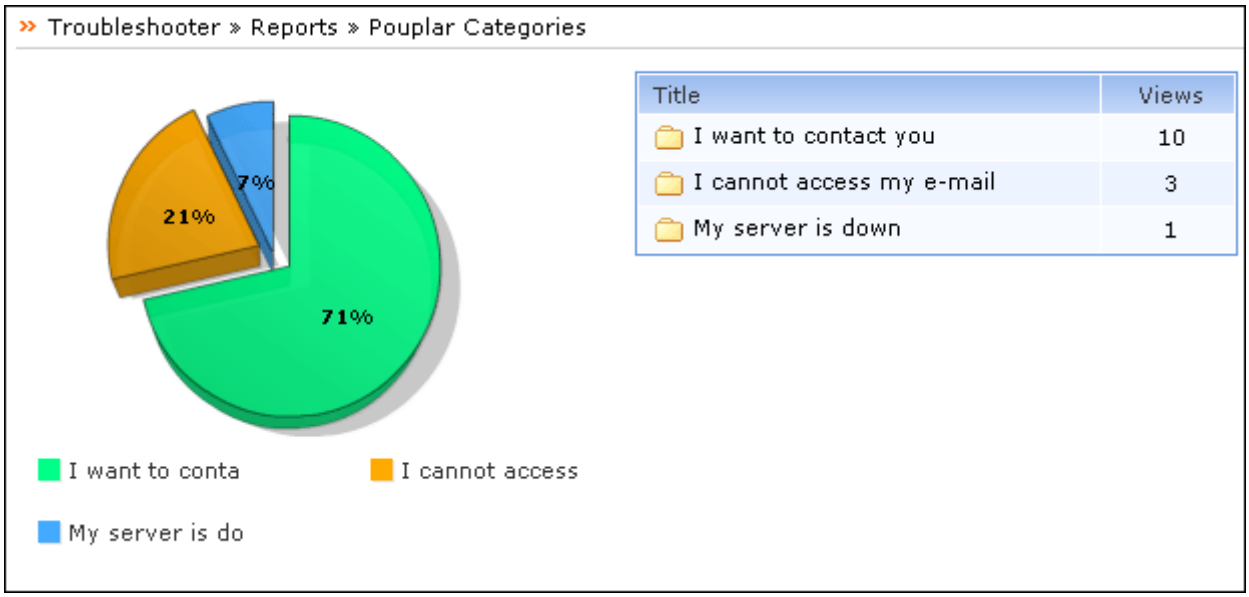
To view troubleshooter related reports:

1. Open **Troubleshooter** on the navigation menu bar, as shown below.

2. Open the **Reports** menu.
3. Click on the appropriate report.

The report features of the troubleshooter allow you to view which categories and steps are the most **popular**.

The **popular categories** report example is shown below.



The **popular steps** report example is shown below.

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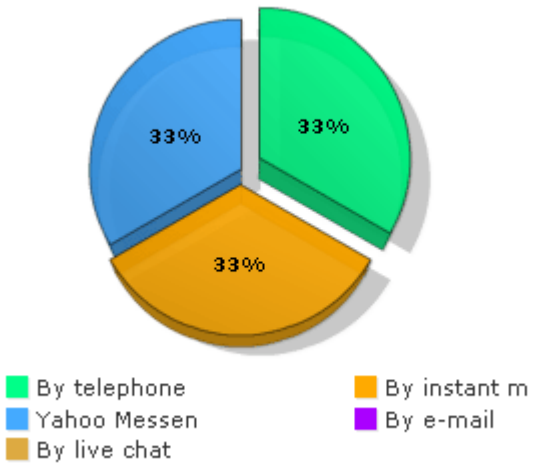
» Troubleshooter » Reports » Popular Steps



Step Title	Views
By telephone	1
By instant messenger	1
Yahoo Messenger	1
By e-mail	0
By live chat	0
AOL Messenger	0
MSN Messenger	0
ICQ Messenger	0

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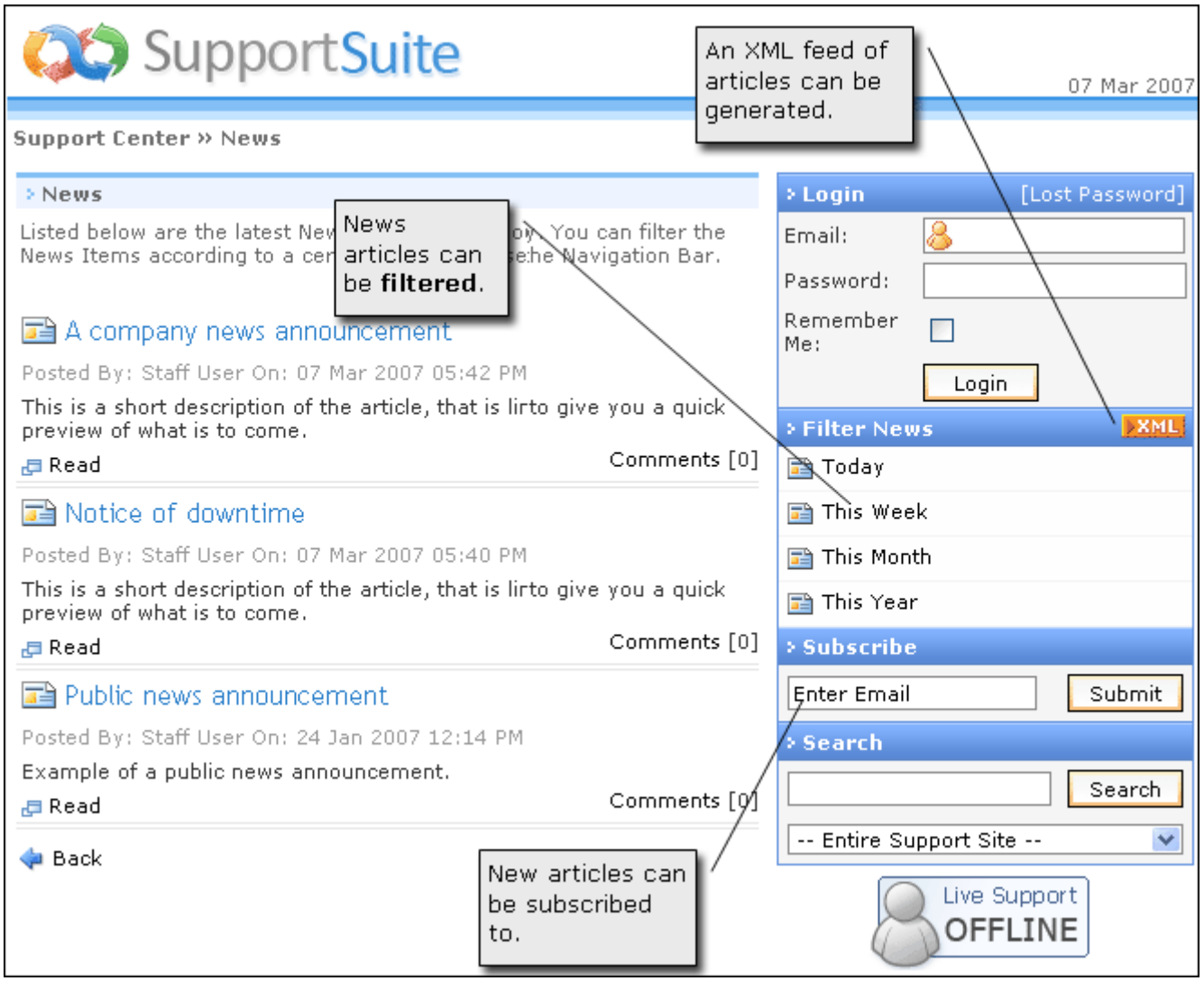
News

SupportSuite comes with the **News** module that allows you to post news items visible to your client users, via the **client support interface** or to staff, via the **dashboard**. News articles can be **commented** on by client users.

XML (RSS) feeds of articles can be generated so that clients can subscribe to your news and announcements using a feed reader or your news items can be cross posted to **blogs** or **bulletin boards** (for example) using a post robot, for example – the RSS syndicating post bot that is a feature of vBulletin Bulletin Board 3.6.X and up (www.vbulletin.com).

News articles can also be set to **expire** after a certain date.

It also possible for client users to **subscribe** to new news articles and receive them by e-mail – users who do this are known as **subscribers**. Client users can do this **without registering** a user account. Subscribers can also be added manually by staff users via the **staff control panel**.


SupportSuite
07 Mar 2007
Support Center » News
An XML feed of articles can be generated.
News articles can be filtered.
News
Listed below are the latest New ... You can filter the News Items according to a cer ... the Navigation Bar.
A company news announcement
Posted By: Staff User On: 07 Mar 2007 05:42 PM
This is a short description of the article, that is lirto give you a quick preview of what is to come.
Read
Comments [0]
Notice of downtime
Posted By: Staff User On: 07 Mar 2007 05:40 PM
This is a short description of the article, that is lirto give you a quick preview of what is to come.
Read
Comments [0]
Public news announcement
Posted By: Staff User On: 24 Jan 2007 12:14 PM
Example of a public news announcement.
Read
Comments [0]
Back
Login
[Lost Password]
Email:
Password:
Remember Me:
Login
Filter News
XML
Today
This Week
This Month
This Year
Subscribe
Enter Email
Submit
Search
Search
-- Entire Support Site --
New articles can be subscribed to.
Live Support
OFFLINE

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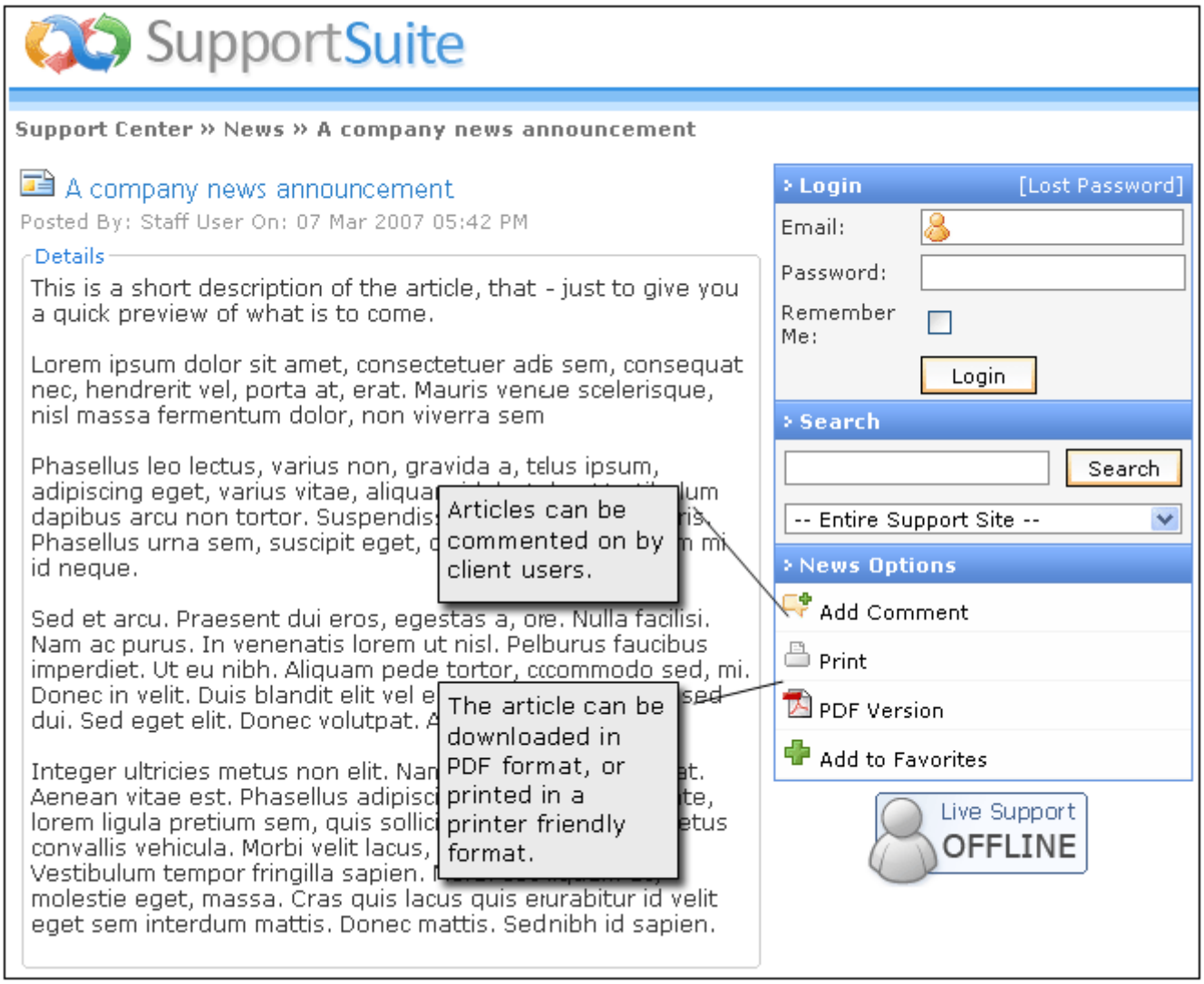
SupportSuite
Support Center » News » A company news announcement
A company news announcement
Posted By: Staff User On: 07 Mar 2007 05:42 PM
Details
This is a short description of the article, that - just to give you a quick preview of what is to come.
Lorem ipsum dolor sit amet, consectetuer adi sem, consequat nec, hendrerit vel, porta at, erat. Mauris venue scelerisque, nisl massa fermentum dolor, non viverra sem
Phasellus leo lectus, varius non, gravida a, telus ipsum, adipiscing eget, varius vitae, aliqua dapibus arcu non tortor. Suspendis Phasellus urna sem, suscipit eget, id neque.
Articles can be commented on by client users.
Sed et arcu. Praesent dui eros, egestas a, ore. Nulla facilisi. Nam ac purus. In venenatis lorem ut nisl. Pelburus faucibus imperdiet. Ut eu nibh. Aliquam pede tortor, ccommodo sed, mi. Donec in velit. Duis blandit elit vel e dui. Sed eget elit. Donec volutpat.
The article can be downloaded in PDF format, or printed in a printer friendly format.
Integer ultricies metus non elit. Nan Aenean vitae est. Phasellus adipisci lorem ligula pretium sem, quis sollici convallis vehicula. Morbi velit lacus, Vestibulum tempor fringilla sapien. molestie eget, massa. Cras quis lacus quis elurabitur id velit eget sem interdum mattis. Donec mattis. Sednibh id sapien.
Login
[Lost Password]
Email:
Password:
Remember Me:
Login
Search
Search
-- Entire Support Site --
News Options
Add Comment
Print
PDF Version
Add to Favorites
Live Support
OFFLINE

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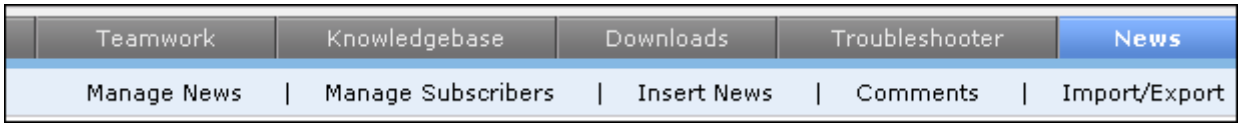
Managing news articles

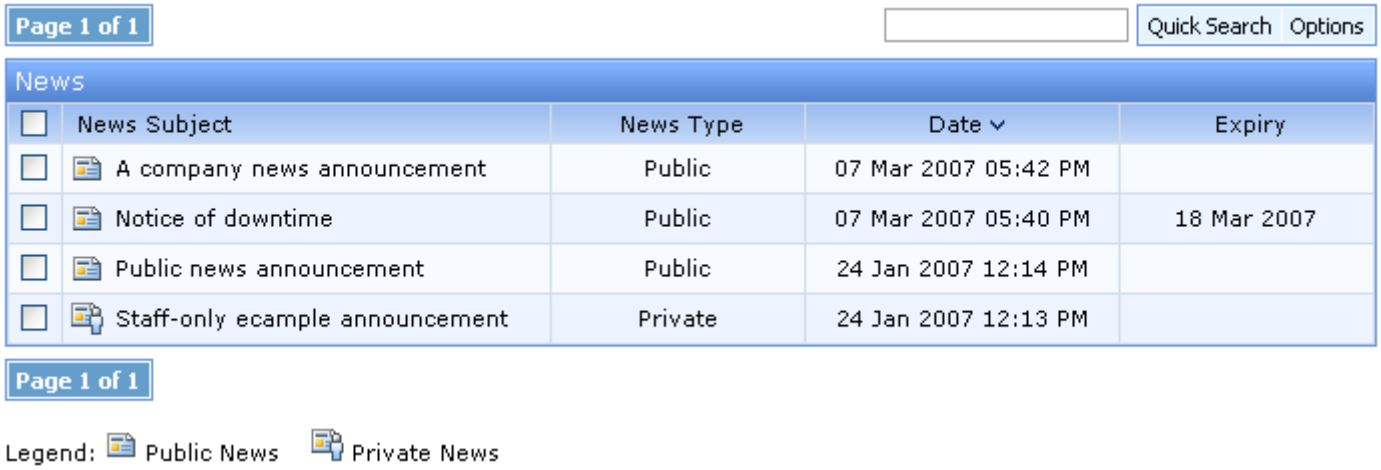
To view and manage news articles:

1. Open **News** on the navigation menu bar, as shown below.

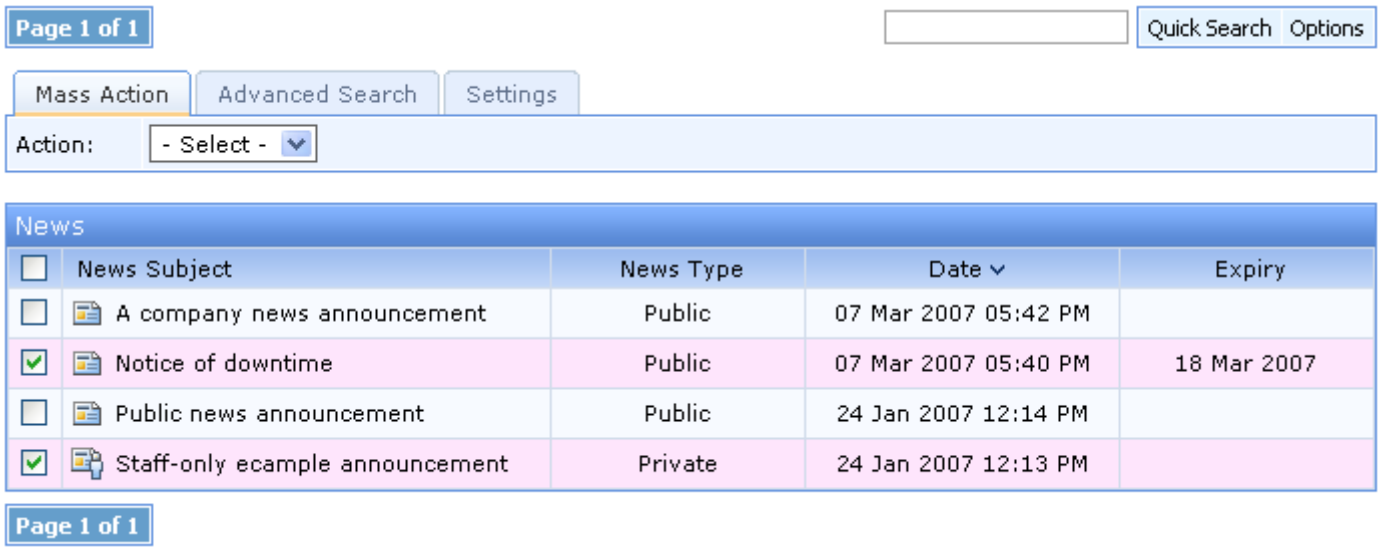


2. Click on **Manage News**.

A list of all the news articles stored in the database will be listed, as shown below.



Selecting multiple news articles (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, news articles can be mass-deleted. Under the **Advanced Search** tab, news articles can be searched for by title, description or by content. Under the **Settings** tab, the number of news articles shown per page (if there are many) can be limited.



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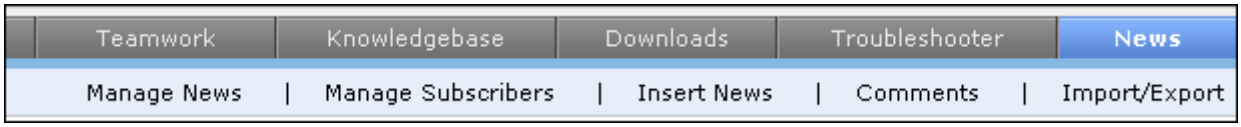
To edit a news article, click on the news article's title. Refer to news article fields for documentation on the required fields for creating a news article.

Creating a news article

To create a news article:

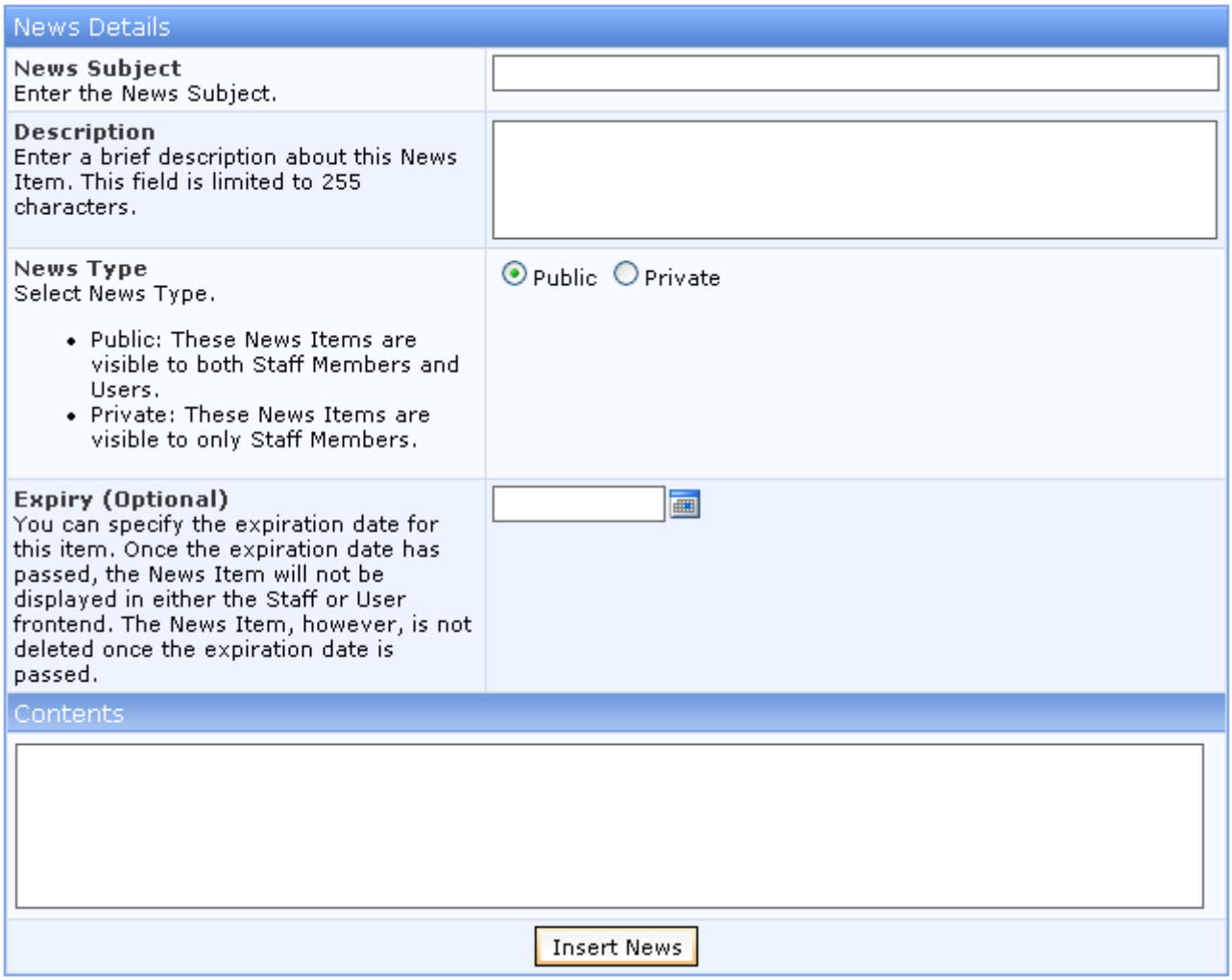
1. Open **News** on the navigation menu bar, as shown below.



2. Click on **Insert News**.

Now refer to the news article fields for documentation on the required fields for creating a news article.

News article fields


News Details
News Subject
Enter the News Subject.
Description
Enter a brief description about this News Item. This field is limited to 255 characters.
News Type
Select News Type.
Public: These News Items are visible to both Staff Members and Users.
Private: These News Items are visible to only Staff Members.
Public
Private
Expiry (Optional)
You can specify the expiration date for this item. Once the expiration date has passed, the News Item will not be displayed in either the Staff or User frontend. The News Item, however, is not deleted once the expiration date is passed.
Contents
Insert News

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News Details

- **News Subject** – the title of the news article.
- **Description** – a short, brief overview of the news article (limited to 255 characters).
- **News Type** – if set to **public,** the news article will be visible to client users from within the **client support interface**. If set to **private**, the article will not be visible to client users and only to staff users. Private staff user articles are also shown on the dashboard of the **staff control panel**.
- **Expiry** – if this article is to expire (be removed from client view after a certain amount of time), the date of expiry should be set here. Note that an **expired** article will **not** be deleted. Click on the calendar icon to open the date selector.

News Options
Send Email?
Select whether or not the system should send Emails to all registered subscribers.
Yes
No
Custom Email Subject
You can specify a custom Email subject. This field is optional. If not specified, the News Item subject is used.
From Name
This is the From Name that will be used for the outgoing mails to the subscribers.
Staff User
From Email
This is the From Email address that will be used for the outgoing mails.
staff@user.com
Template Group
Select the Template Group for this News Item.
default
Insert News

News Options

- **Send Email?** – if set to yes, the article will be sent out to all client users who have subscribed to news postings.
- **Custom Email Subject** – if left blank, the title of the news article being created will be used as the subject.
- **From Name** – the from name e-mail field.
- **From Email** – the from e-mail field.
- **Template Group** – if multiple templates are used in your SupportSuite installation, the template group in which this news item will appear can be set here.

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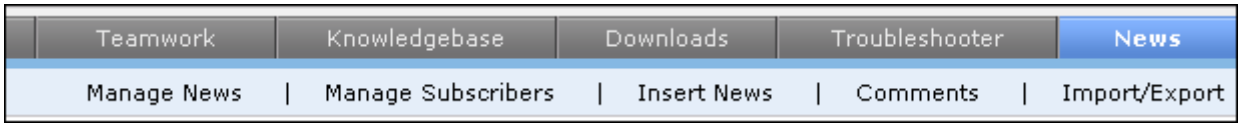
Managing news subscribers

A **subscriber** is a client user who has added their e-mail address to the news subscription list, via the **client support interface**. A user does **not** need a user account to be able to do this.

When a user subscribes to new news article postings, he or she must confirm their subscription by validating their e-mail address, or a staff user can validate a subscription manually. A staff user can also manually add subscribers.

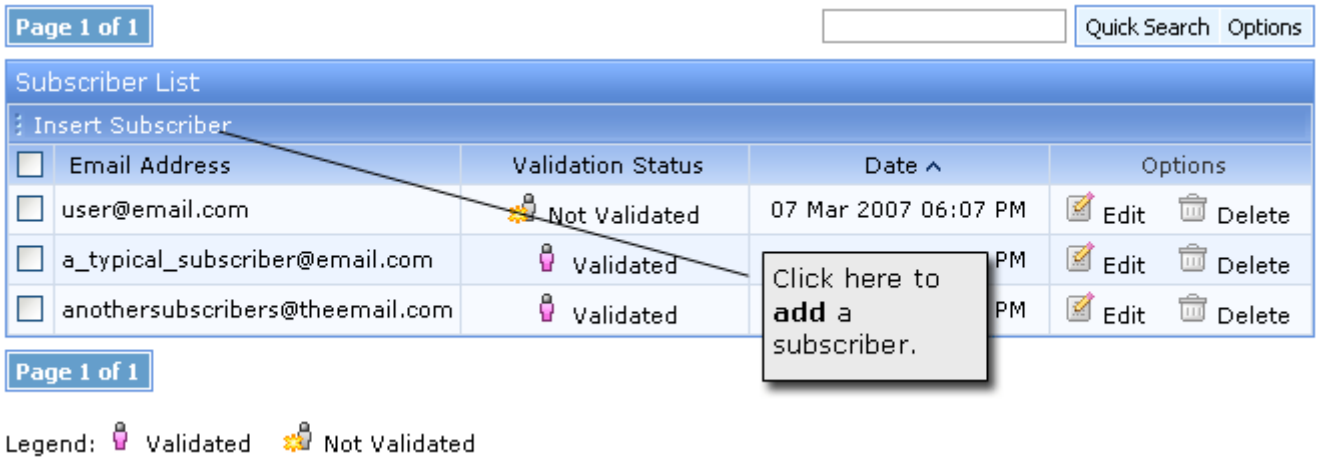
To view and manage subscribers:

1. Open **News** on the navigation menu bar, as shown below.

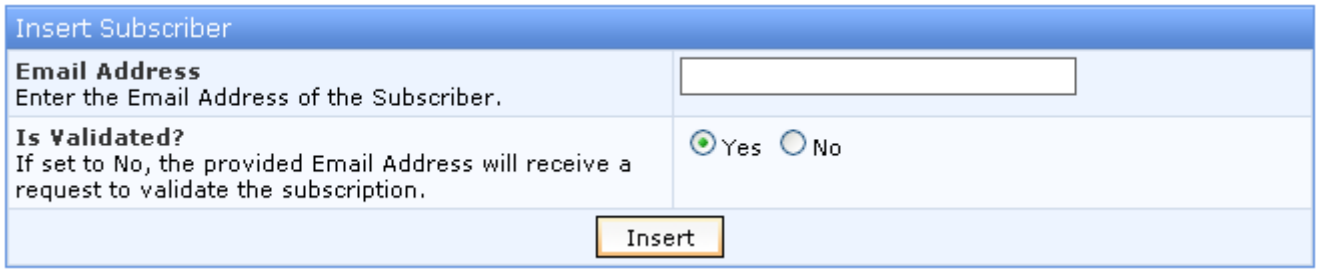


2. Click on **Manage Subscribers**.

You will be presented with a list of current subscribers and unvalidated subscribers, as shown below.



Clicking on the **Insert Subscriber** button (as indicated above) allows you to manually add subscribers, as shown below.


Insert Subscriber
Email Address
Enter the Email Address of the Subscriber.
Is Validated?
If set to No, the provided Email Address will receive a request to validate the subscription.
Yes
No
Insert

Selecting multiple subscribers (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, subscribers can be mass-deleted. Under the **Advanced Search** tab, subscribers can be searched for by e-mail address. Under the **Settings** tab, the number of subscribers shown per page (if there are many) can be limited.

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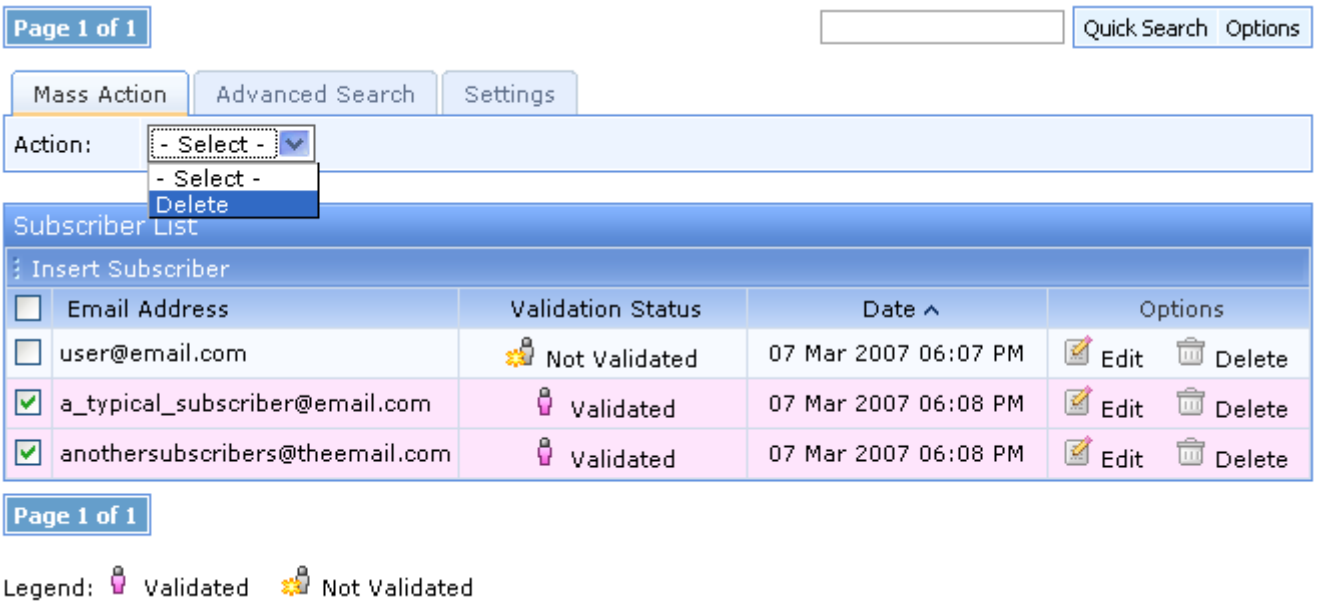

Click on the edit icon to edit a subscriber's e-mail address and modify the subscriber's **validation status**.

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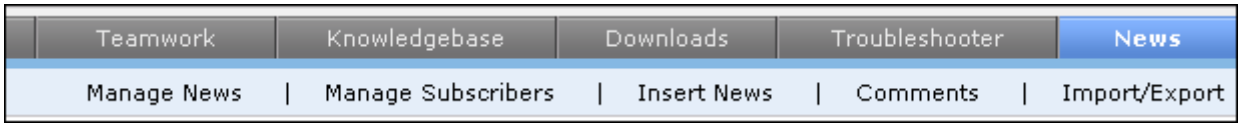
View and moderate news comments

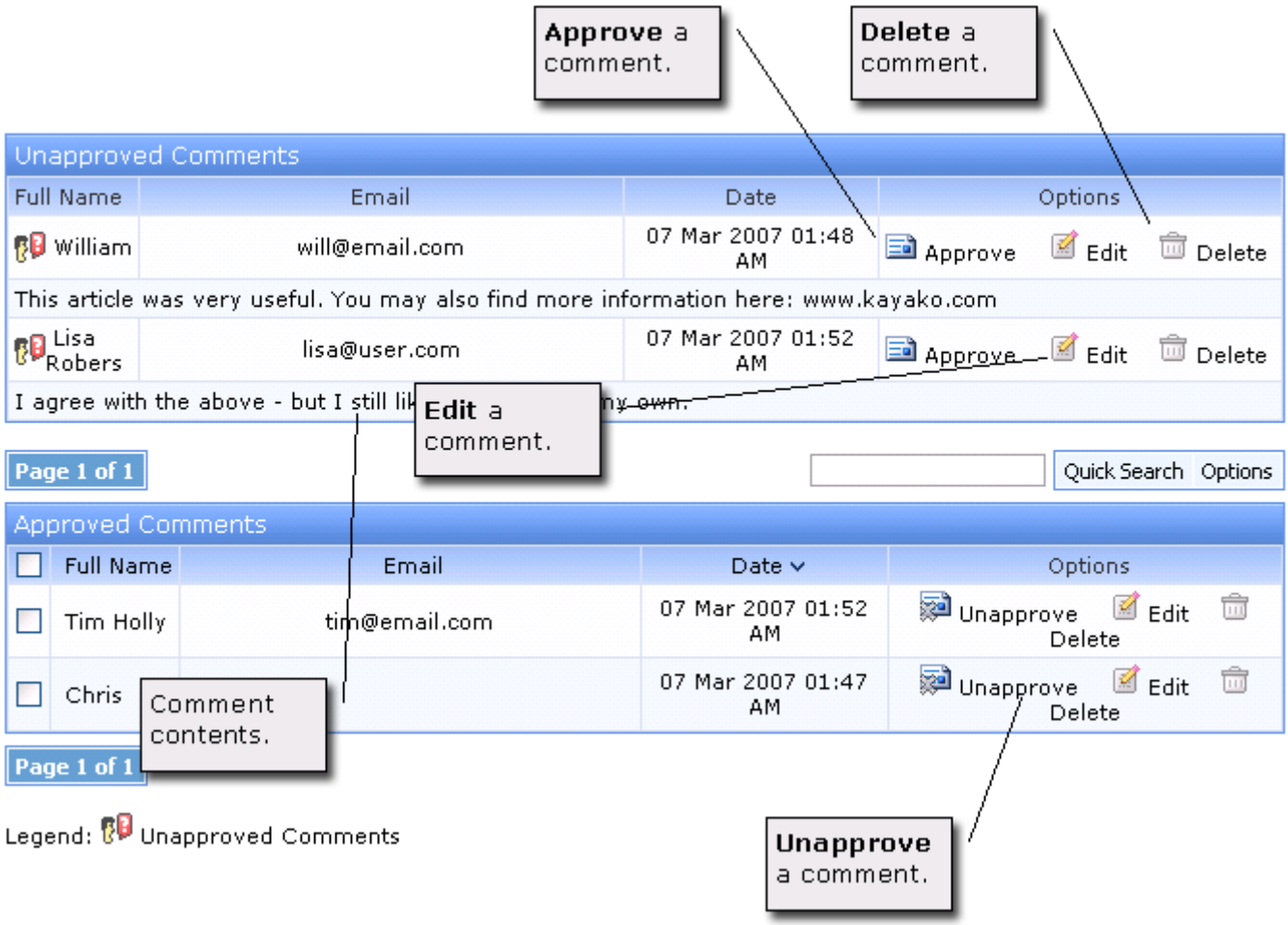
To view and moderate user comments:

1. Open **News** on the navigation menu bar, as shown below.



2. Click on **Comments**.

Per configuration in the **administrator control panel**, comments may require **approval** by a staff user before they are displayed publicly via the **client support interface**.



Selecting multiple comments (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, comments can be mass-deleted and mass-unapproved. Under the **Advanced Search** tab, comments can be searched for by title, writer or by their contents. Under the **Settings** tab, the number of comments shown per page (if there are many) can be limited.

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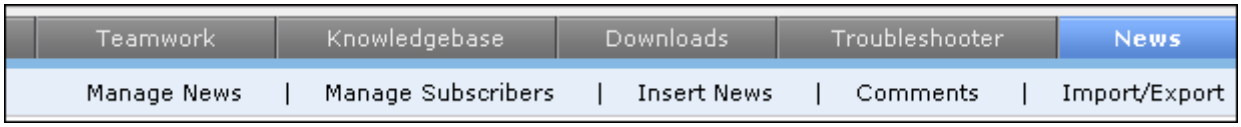
Importing and exporting news subscribers

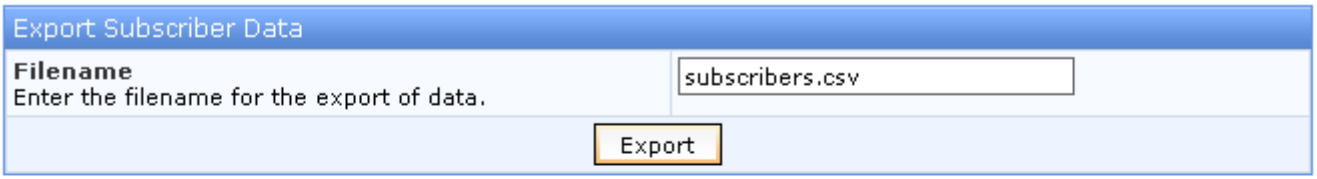
Subscriber's e-mail addresses can be imported and exported. They can be mass-added by pasting line separated e-mail addresses into a box, and can be exported in a **CSV** (comma-separated value) data file.

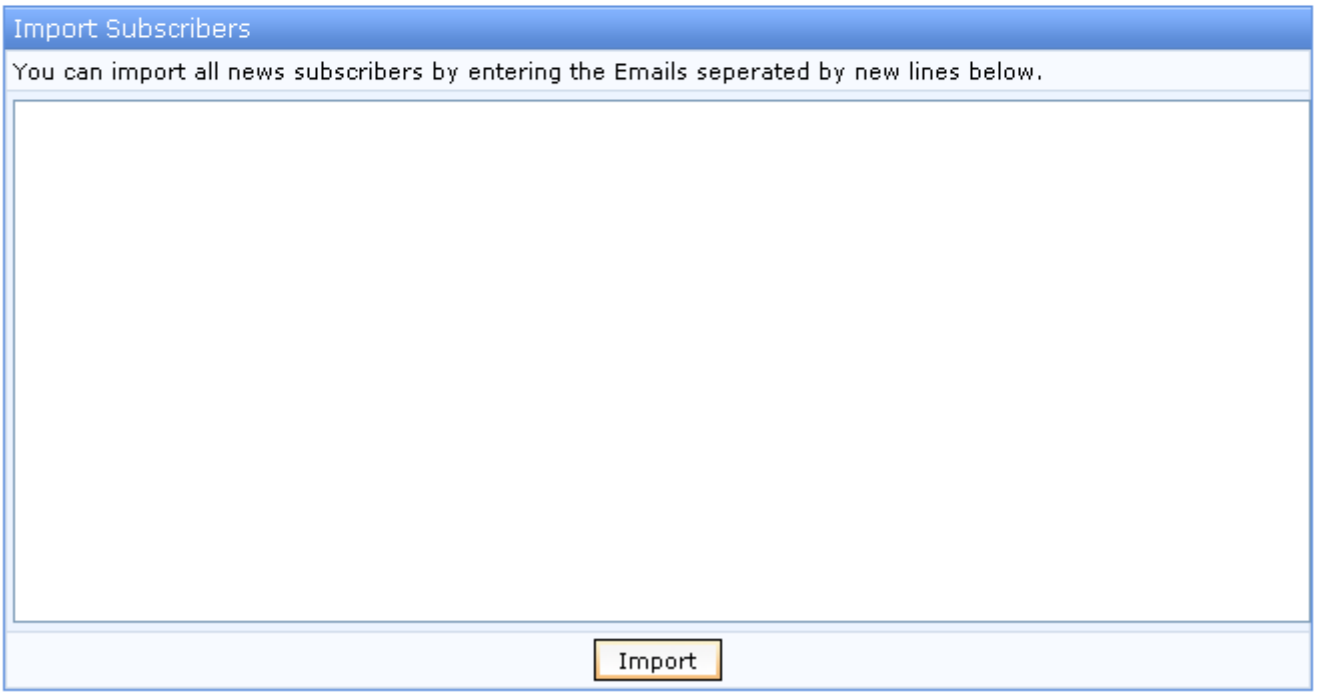
To import and export subscribers:

1. Open **News** on the navigation menu bar, as shown below.



2. Click on **Import/Export**.





To export the list of subscribers, click on the **Export** button. To import a list of e-mail addresses and add them as subscribers, paste them into the box (each separated by a **new line**) and press the **Import** button.

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Administrator control panel user manual

An administrator user would normally use the administrator control panel to tend to the following tasks:

- Make system-wide configuration changes.
- Change installation options and tweak installation settings.
- Manage departments.
- Manage staff users.
- Manager other administrator users.
- Modify and customize client support interface templates.
- Modify and customize language packs and phrases.
- Manage e-mail systems
  - Manage e-mail queues (piping, POP3 and IMAP mail collection).
  - Manage e-mail parser rules.
- Manage SLA plans
  - Manage SLA plan escalation rules.
  - Manage support desk schedules (opening hours).
- Manage custom fields.
- View system and mail parser logs.
- Perform database diagnostics.
- Manage available ticket statuses, priorities and attachment types.

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What is an administrator?

An administrator user is a staff user with administrator privileges.

This means that they are part of the administrator user group, can access the administrator control panel and from there make system wide configuration changes.

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Accessing the administrator control panel

The administrator control panel can be accessed at:
http://www.*yourdomainname*.com/*pathtosupportsuite*/admin

You will be presented with a login form similar to the one shown below.

- **Username** – your staff/admin username.
- **Password** – your staff/admin password.
- **Remember Me** – if enabled, your login details will be 'remembered' using a browser-based cookie.

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Staff status

The **online staff** box lists all staff users who are currently logged into the staff or admin control panel.

- A **purple icon** denotes the staff user logged into LiveResponse Client Application.
- A **yellow icon** denotes the staff user logged into the staff control panel.
- A **pink icon** denotes the staff user is logged into the administrator control panel.
- A **PDA icon** denotes the staff user is logged into the staff control panel via the PDA interface.

Clicking a staff user's name from within this box will take you immediately to a new **private message** screen, allowing you to send a private message to that staff member.

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Staff

Staff user accounts are created and managed within the administrator control panel. A staff user account can be a regular staff user account (that has access only the to staff control panel) or it can be an administrator account (that has access both to the staff control panel as a staff user and the administrator control panel as an admin user).

Staff user accounts can be assigned to teams, which are also managed within the administrator control panel. Teams can be assigned permissions which all staff users inherit if specified for the staff user account. If specified, a staff user account can have individual permissions and still be a member of a team.

All staff user accounts must be a member of a team. The default two teams are **Staff** and **Administrator**. A staff user becomes an administrator user when added to the administrator team.

- The staff control panel can be accessed here:
    - www.*yourdomain*.com/*support_installation*/staff
- The administrator control panel can be accessed here:
    - www.*yourdomain*.com/*support_installation*/admin

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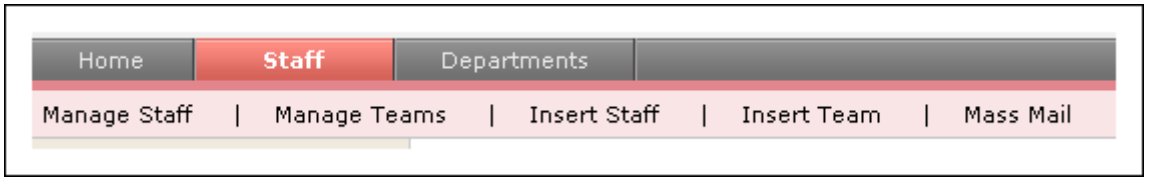
Teams

Staff user accounts can be assigned to teams. Teams can be assigned permissions which all staff users inherit if specified for the staff user account. If specified, a staff user account can have individual permissions and still be a member of a team. All staff user accounts must be a member of a team.

The default two teams are **Staff** and **Administrator**. A staff user becomes an administrator user when added to the administrator team.

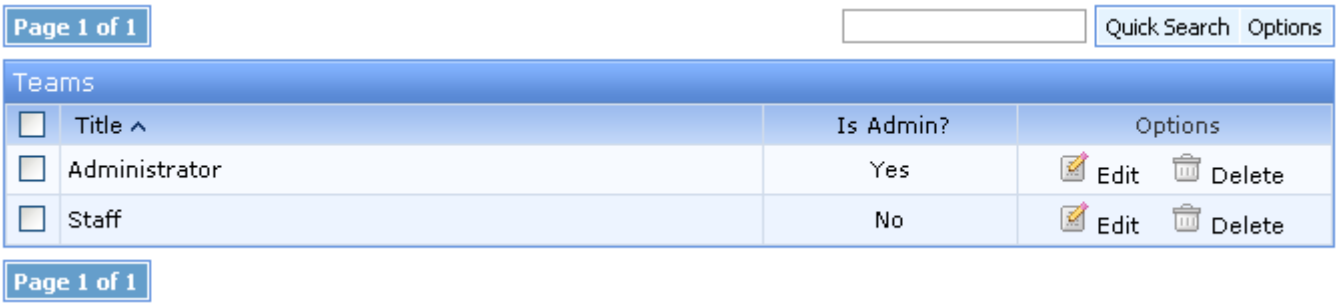
To view and manage staff teams:

1. Click on the **Staff** tab on the administrator control panel navigation bar, as shown below.



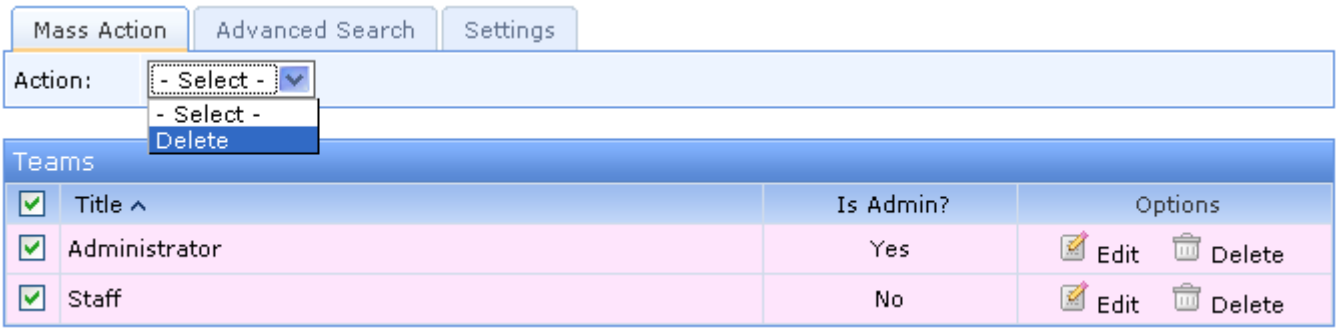
2. Click on **Manage Teams**.

A list of the staff groups set up for the system is listed, as shown below.



To **delete** a staff team, click on the corresponding delete icon.

Selecting multiple teams (by checking the corresponding check boxes, as shown below) will open the mass-management menu, as shown below. Using this menu, teams can be mass-deleted. Under the **Advanced Search** tab, teams can be searched for by full name. Under the **Settings** tab, the number of teams shown per page (if there are many) can be limited.



To **edit** a staff team, click on the corresponding edit icon. From here you are able to configure the properties and permissions for this staff team.

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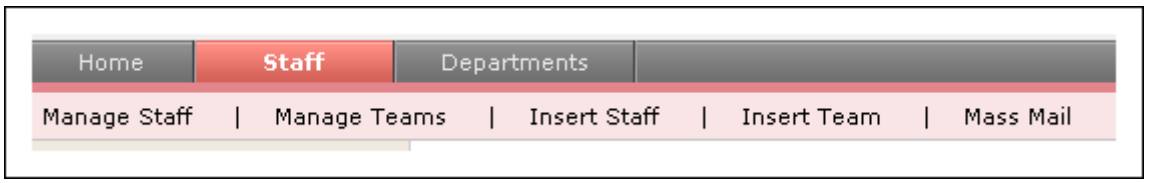
Refer to staff team fields for documentation on the required fields for editing a staff team.

Creating a new staff team

To create a new staff team:

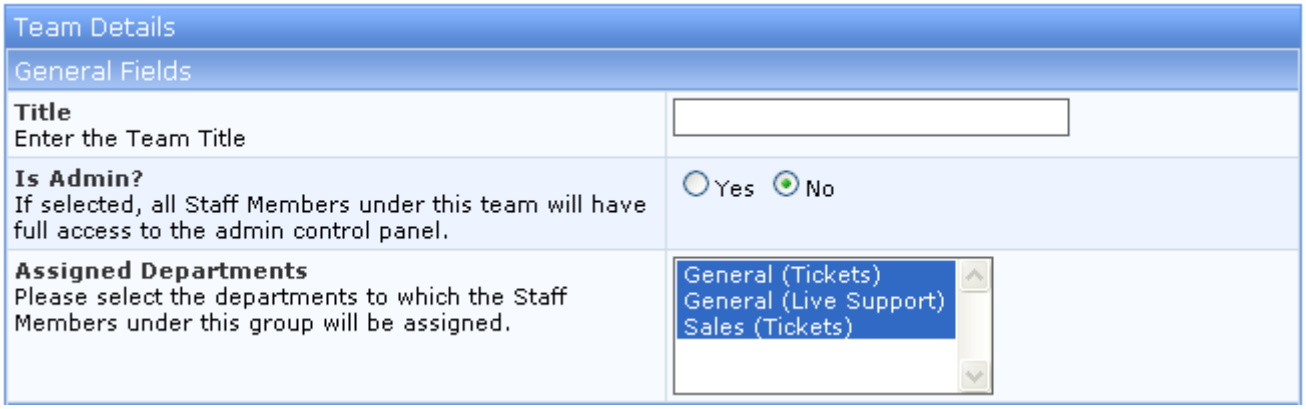
1. Click on the **Staff** tab on the administrator control panel navigation bar, as shown below.



2. Click on **Insert Team**.

From here you are able to configure the properties and permissions for the new staff team. Refer to staff team fields for documentation on the required fields for editing a staff team

Staff team fields


Team Details
General Fields
Title
Enter the Team Title
Is Admin?
If selected, all Staff Members under this team will have full access to the admin control panel.
Yes
No
Assigned Departments
Please select the departments to which the Staff Members under this group will be assigned.
General (Tickets)
General (Live Support)
Sales (Tickets)

General Fields

- **Title** – a title for this staff team.
- **Is Admin?** – if enabled, staff users added to this team will have full access to the administrator control panel.
- **Assigned Departments** – specify here the departments that staff users added to this team can view and access in the staff control panel.

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Tickets	
Can View Tickets Tab	Yes No
Can Manage Tickets	Yes No
Can Create New Ticket	Yes No
Can Delete Ticket	Yes No
Can Delete Ticket Post	Yes No
Can Edit Ticket Post	Yes No
Can Export as PDF/XML	Yes No
Can Forward Ticket	Yes No
Can Add Billing Entries	Yes No
Can Delete Ticket Recipients	Yes No
Can Merge Ticket	Yes No
Can Create Public Alert Rules	Yes No
Can Delete Public Alert Rules	Yes No
Can Edit Public Alert Rules	Yes No
Can Delete Ticket Label	Yes No
Can View All Tickets (Unassigned, Assigned to Self & Assigned to Others)	Yes No
Can Delete Ticket Views	Yes No

Tickets

- **Can View Tickets Tab –** if enabled, staff users added to this team will be able to view the tickets tab in the staff control panel.
- **Can Manage Tickets –** if enabled, staff users added to this team will be able to manage tickets (see ticket handling in the staff control panel).
- **Can Create New Ticket -** if enabled, staff users added to this team will be able to create new tickets (send e-mails or create phone tickets) (see creating a ticket in the staff control panel).
- **Can Delete Ticket -** if enabled, staff users added to this team will be able to delete tickets.
- **Can Delete Ticket Post -** if enabled, staff users added to this team will be able to individual ticket replies.
- **Can Export as PDF/XML -** if enabled, staff users added to this team will be able to export ticket replies as PDF or syndicated XML (see export in the staff control panel).
- **Can Forward Ticket -** if enabled, staff users added to this team will be able to forward tickets (see forwarding a ticket in the staff control panel).
- **Can Add Billing Entries -** if enabled, staff users added to this team will be able to add billing and work time tracking entries (see billing information and time tracking in the staff control panel).

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- **Can Delete Ticket Recipients -** if enabled, staff users added to this team will be able to delete ticket recipients.
- **Can Merge Ticket -** if enabled, staff users added to this team will be able to merge a ticket with another.
- **Can Create Public Alert Rules -** if enabled, staff users added to this team will be able to create public ticket alert rules (see ticket alerts in the staff control panel).
- **Can Delete Public Alert Rules -** if enabled, staff users added to this team will be able to delete public ticket alert rules (see ticket alerts in the staff control panel).
- **Can Edit Public Alert Rules -** if enabled, staff users added to this team will be able to edit public ticket alert rules (see ticket alerts in the staff control panel).
- **Can Delete Ticket Label -** if enabled, staff users added to this team will be able to delete ticket labels (see ticket labels in the staff control panel).
- **Can View All Tickets (Unassigned, Assigned to Self and Assigned to Others) –** if enabled, staff users added to this team will be able to view all tickets, regardless of ownership.
- **Can Delete Ticket Views –** if enabled, staff users added to this team will be able to delete ticket listing views (see customizing your ticket lists in the staff control panel).

Live Support

- **Can View Tickets Tab –** if enabled, staff users added to this team will be able to view the Live Support tab in the staff control panel.

Troubleshooter

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- **Can View Troubleshooter Tab –** if enabled, staff users added to this team will be able to view the troubleshooter tab in the staff control panel.
- **Can Manage Categories -** if enabled, staff users added to this team will be able to manage troubleshooter categories (see troubleshooter in the staff control panel).
- **Can Manage Steps -** if enabled, staff users added to this team will be able to manage troubleshooter steps (see troubleshooter in the staff control panel).
- **Can Insert Category -** if enabled, staff users added to this team will be able to create new troubleshooter categories (see create a category in the staff control panel).
- **Can Edit Category -** if enabled, staff users added to this team will be able to edit troubleshooter categories (see troubleshooter in the staff control panel).
- **Can Delete Category -** if enabled, staff users added to this team will be able to delete troubleshooter categories (see troubleshooter in the staff control panel).
- **Can Add New Troubleshooter Step -** if enabled, staff users added to this team will be able to edit a troubleshooter category (see troubleshooter in the staff control panel).
- **Can Edit Existing Step -** if enabled, staff users added to this team will be able to edit troubleshooter "steps" (see troubleshooter in the staff control panel).
- **Can Delete Troubleshooter Step -** if enabled, staff users added to this team will be able to delete troubleshooter steps (see troubleshooter in the staff control panel).
- **Can Export Troubleshooter Data -** if enabled, staff users added to this team will be able to export troubleshooter data into an XML pack.
- **Can Import Troubleshooter Data –** if enabled, staff users added to this team will be able to import troubleshooter from an XML pack.

Downloads

- **Can View Downloads Tab –** if enabled, staff users added to this team will be able to view the downloads tab in the staff control panel.
- **Can Delete Category -** if enabled, staff users added to this team will be able to delete a downloads category.

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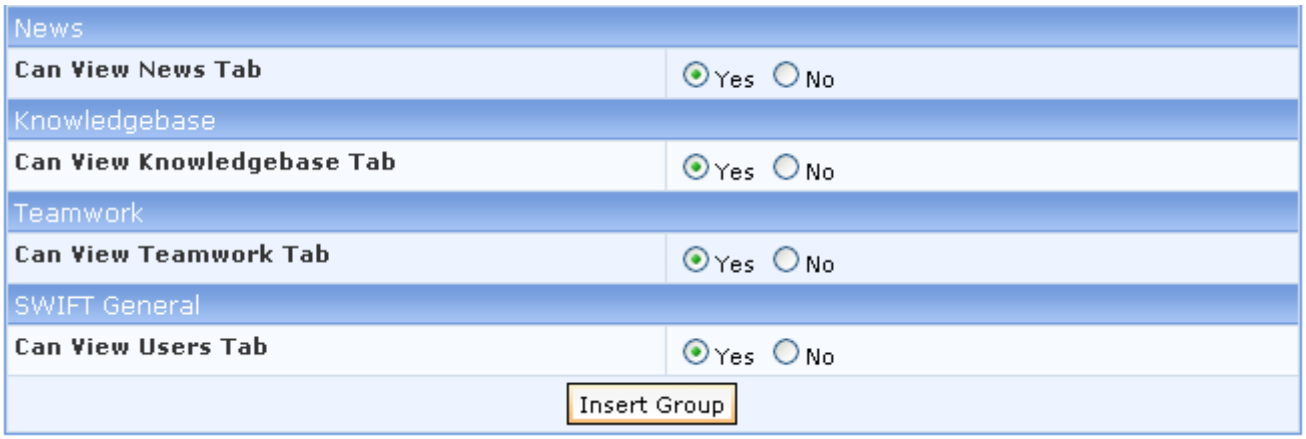
- **Can Edit Category -** if enabled, staff users added to this team will be able to edit an existing downloads category (see viewing and managing file categories in the staff control panel).
- **Can Delete File -** if enabled, staff users added to this team will be able to delete a file download.
- **Can Edit File -** if enabled, staff users added to this team will be able to edit a file download (see viewing and managing files in the staff control panel).
- **Can Insert Category -** if enabled, staff users added to this team will be able to create new download categories (see creating a category in the staff control panel).
- **Can Insert File -** if enabled, staff users added to this team will be able to insert new file downloads (see create a new file in the staff control panel).



News

- **Can View News Tab –** if enabled, staff users added to this team will be able to view the news tab in the staff control panel.

Knowledgebase

- **Can View Knowledgebase Tab –** if enabled, staff users added to this team will be able to view the knowledgebase tab in the staff control panel, and have subsequent permissions to knowledgebase functions.

Teamwork

- **Can View Teamwork Tab –** if enabled, staff users added to this team will be able to view the teamwork tab in the staff control panel, and have subsequent permissions to the teamwork functions.

SWIFT General

- **Can Users News Tab –** if enabled, staff users added to this team will be able to view the users tab in the staff control panel, and have subsequent permissions to client user related functions.

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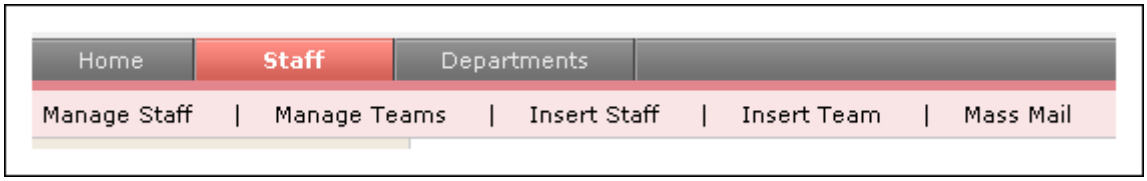
Staff users

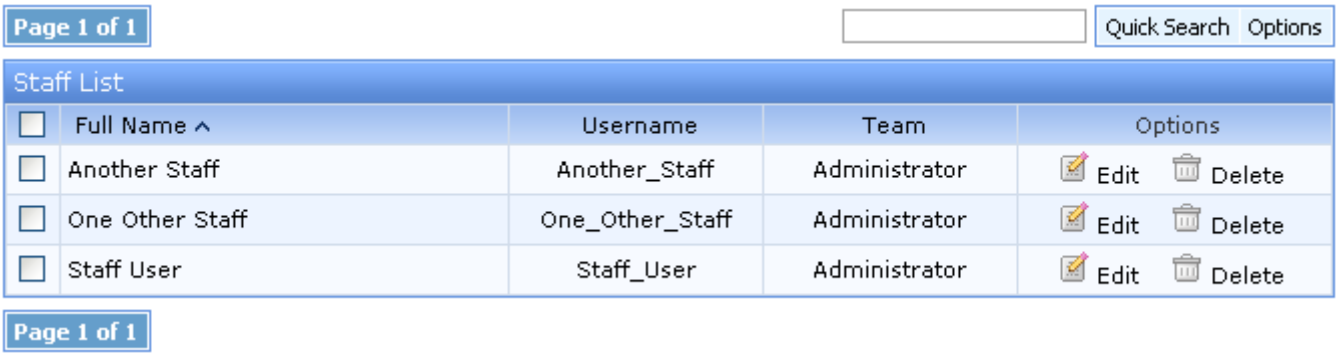
To view and manage staff users:

1. Click on the **Staff** tab on the administrator control panel navigation bar, as shown below.



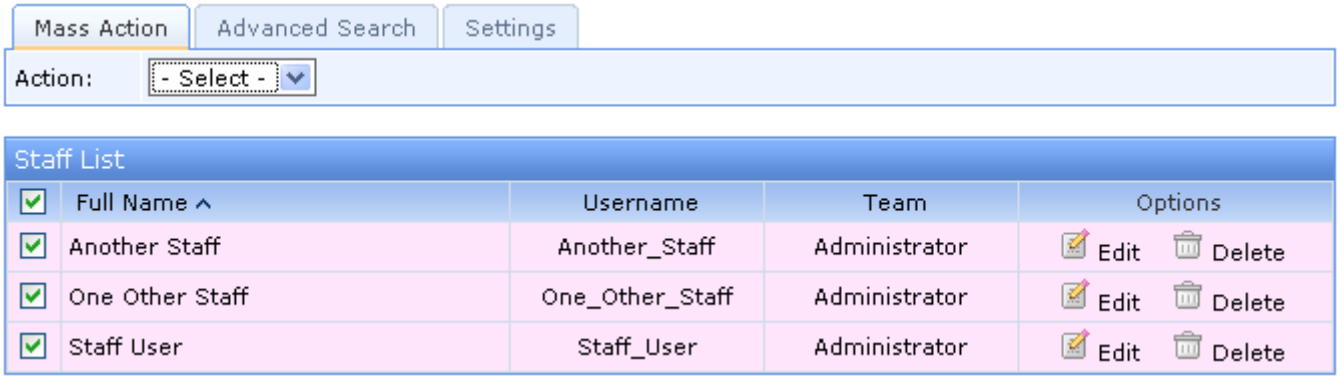
2. Click on **Manage Staff**.

A list of all the staff users registered in the system will be shown as below.



To **delete** a staff user account, click on the corresponding delete icon.

Selecting multiple accounts (by checking the corresponding check boxes, as shown below) will open the mass-management menu, as shown below. Using this menu, accounts can be mass-deleted. Under the **Advanced Search** tab, accounts can be searched for by full name. Under the **Settings** tab, the number of accounts shown per page (if there are many) can be limited.



To **edit** a staff user account, click on the corresponding edit icon. A list of the properties and preferences specific to this user account are listed.

Refer to staff user fields for documentation on the required fields for editing a staff user account.

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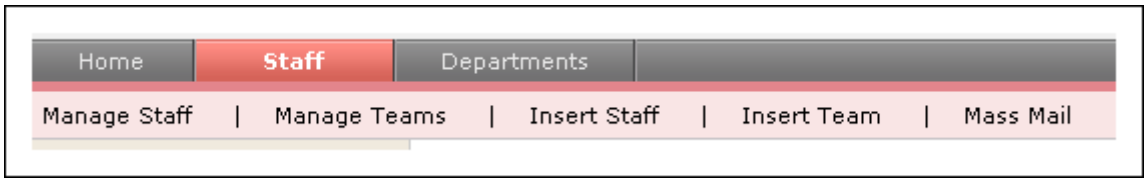
Creating a staff user account

To create a new staff user account:

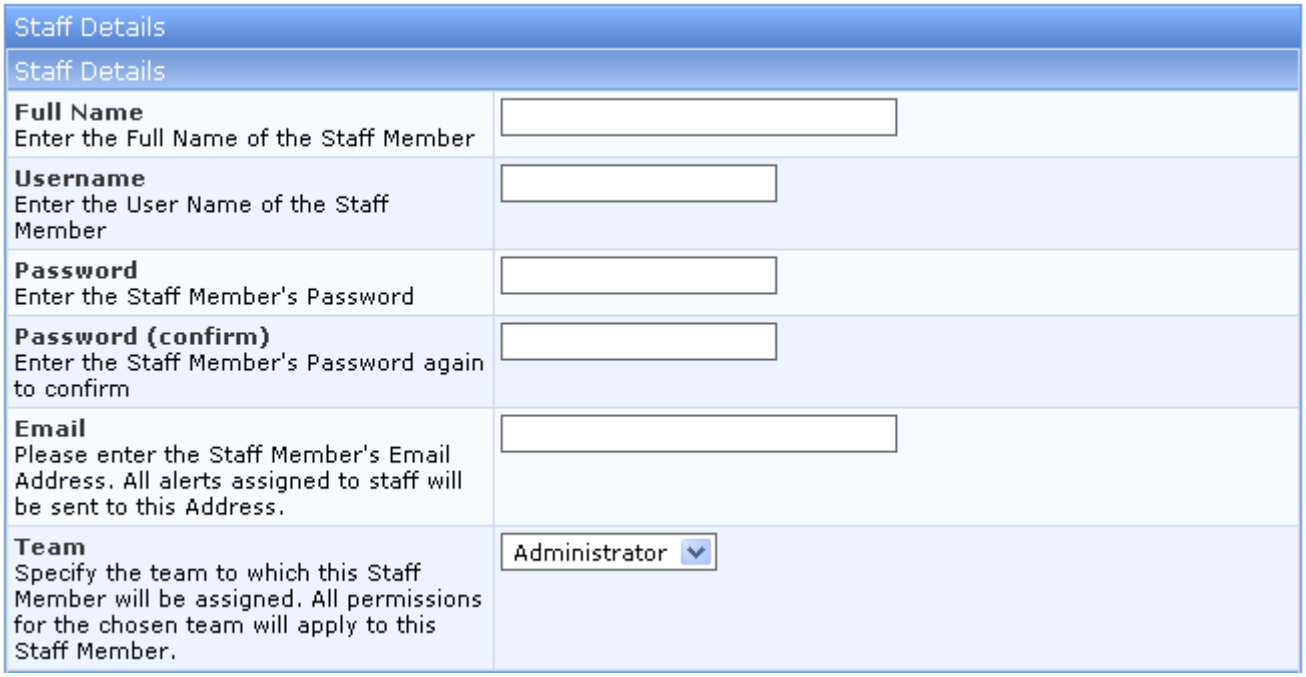
1. Click on the **Staff** tab on the administrator control panel navigation bar, as shown below.



2. Click on **Insert Staff**.

A list of the properties and preferences specific to a staff user account are listed. Refer to staff user fields for documentation on the required fields for creating a new staff user account.

Staff user fields


Staff Details
Staff Details
Full Name
Enter the Full Name of the Staff Member
Username
Enter the User Name of the Staff Member
Password
Enter the Staff Member's Password
Password (confirm)
Enter the Staff Member's Password again to confirm
Email
Please enter the Staff Member's Email Address. All alerts assigned to staff will be sent to this Address.
Team
Specify the team to which this Staff Member will be assigned. All permissions for the chosen team will apply to this Staff Member.
Administrator

Staff Details

- **Full Name** – the full name of the staff user (this will be used to identify the user and as the staff user's name in outgoing e-mail replies, ticket replies and staff user lists).
- **Username** – the username of this staff user (the staff user will use this to log into the system).
- **Password** – the staff user account's password.
- **Email** – the staff user's personal e-mail address. Ticket alerts (for example) will be sent to this address. Do not set this e-mail to one that is the same as a configured e-mail queue,

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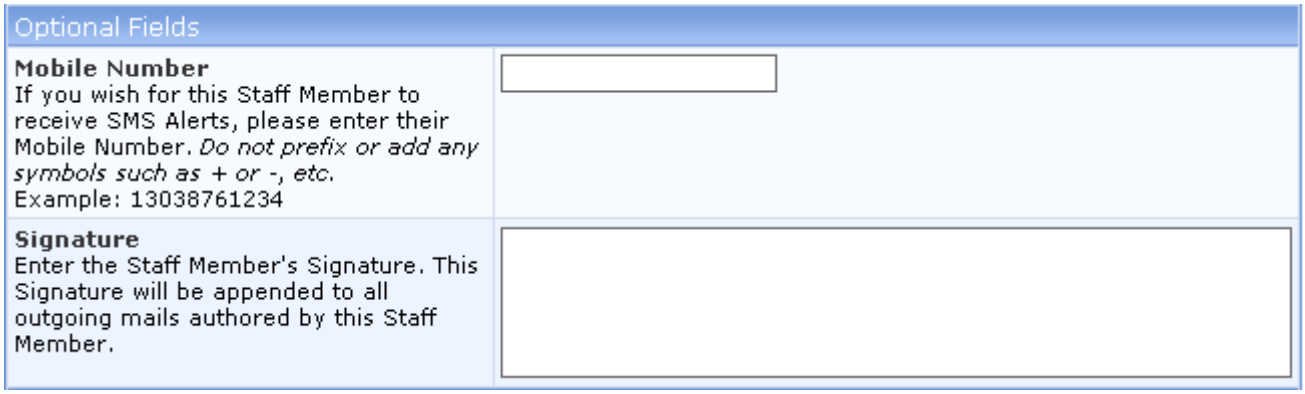
otherwise mail loops may occur.

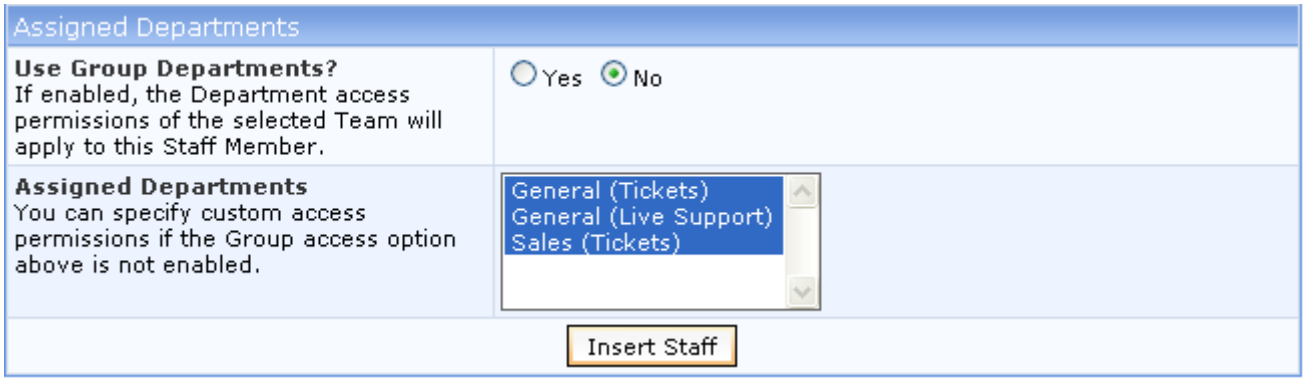
- **Team** – to which team this staff user account belongs.


Optional Fields
Mobile Number
If you wish for this Staff Member to receive SMS Alerts, please enter their Mobile Number. Do not prefix or add any symbols such as + or -, etc.
Example: 13038761234
Signature
Enter the Staff Member's Signature. This Signature will be appended to all outgoing mails authored by this Staff Member.

Optional Fields
This fields are not required and are optional.

- **Mobile Number** – the staff user's mobile (cellular) phone number. This number will be used to integrate with the Kayako SMS Gateway (if enabled) (see Kayako SMS gateway).

- **Signature** – the signature specified here will be appended to all outgoing ticket replies made by this staff user.


Assigned Departments
Use Group Departments?
If enabled, the Department access permissions of the selected Team will apply to this Staff Member.
Yes
No
Assigned Departments
You can specify custom access permissions if the Group access option above is not enabled.
General (Tickets)
General (Live Support)
Sales (Tickets)
Insert Staff

Assigned Departments

- **Use Group Departments?** – if enabled, department permissions specified in this staff user's assigned team (assigned in *Team* on this same page) will be used for this account. If disabled, permissions specified to this user account will be used.

- **Assigned Departments** – if *Use Group Departments* is enabled, the departments to which this staff user can access are specified here.

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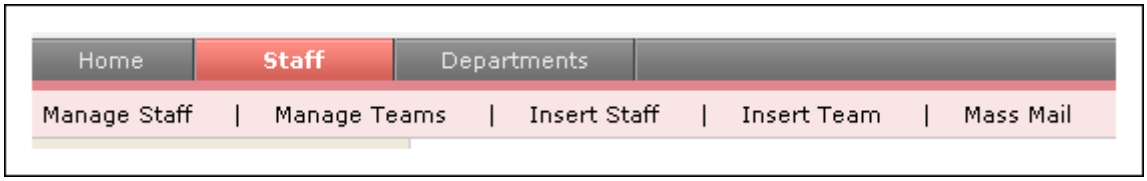
Mass-mailing staff

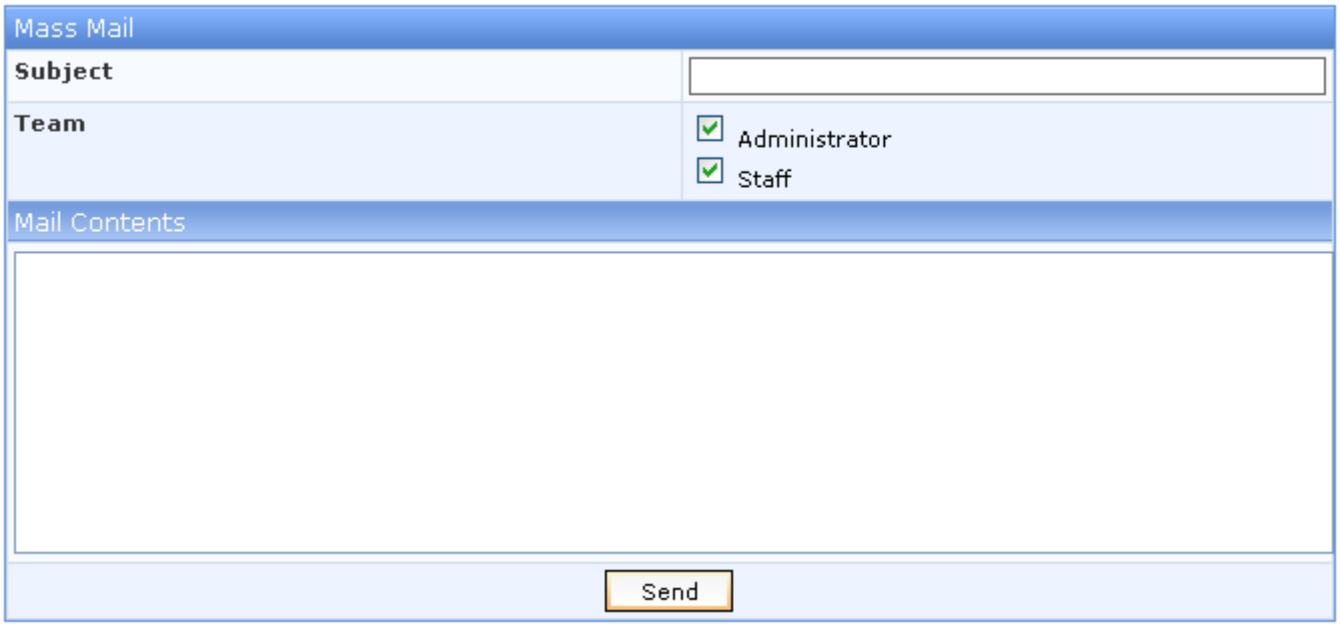
To mass-mail staff users:

1. Click on the **Staff** tab on the administrator control panel navigation bar, as shown below.



2. Click on **Mass Mail**.

Using the mass-mail utility, you are able to send out an e-mail to specified staff teams.



- **Subject** – the subject of the outgoing e-mail.
- **Team** – check the corresponding boxes of the teams to which this e-mail will be sent out.
- **Mail Contents** – the contents of the e-mail.

To send the e-mail, click on the **Send** button.

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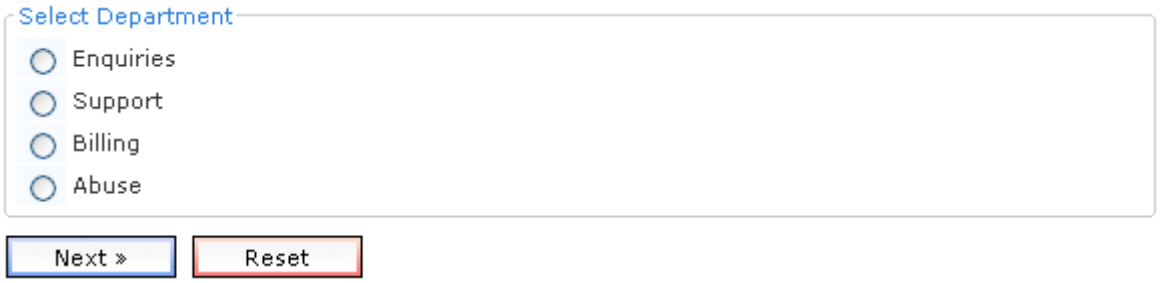
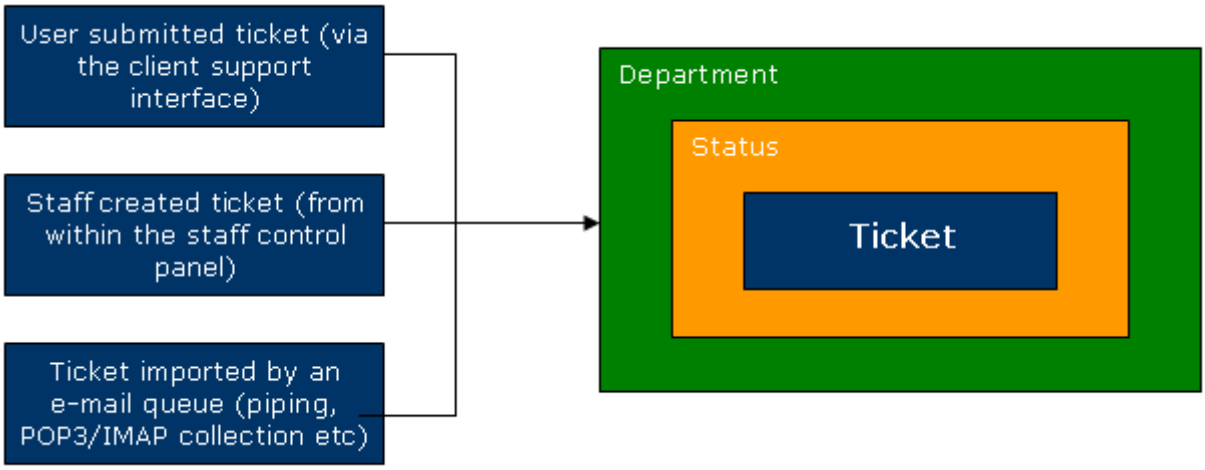
Departments

Departments in SupportSuite and eSupport can be compared to "folders" in a typical e-mail client. However, in this case these folders act as something much more.

A department stores tickets. Within a department, tickets are categorized by ticket status (see ticket status in the staff control panel). When submitting a ticket via the client support interface, the user must select a department to which the ticket is submitted it (as shown below).



Likewise, when submitting a ticket via **e-mail**, an e-mail queue (see e-mail queues) imports the message as a ticket into a specified department (allowing departments to be "tied" to an e-mail address).


User submitted ticket (via the client support interface)
Staff created ticket (from within the staff control panel)
Ticket imported by an e-mail queue (piping, POP3/IMAP collection etc)
Department
Status
Ticket

Specific user permissions can be configured, defining access controls such as being able to submit a ticket to a department with or without registering.

Staff users can be assigned permissions to access a department (see staff).

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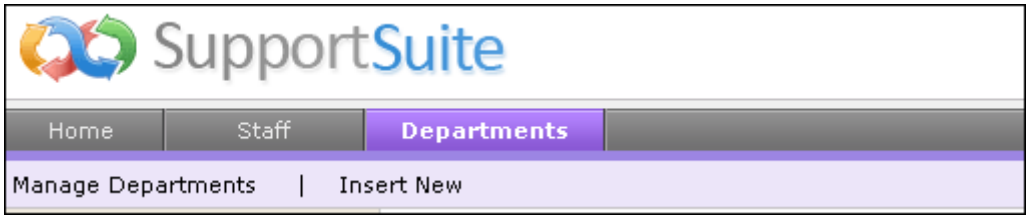
Managing departments

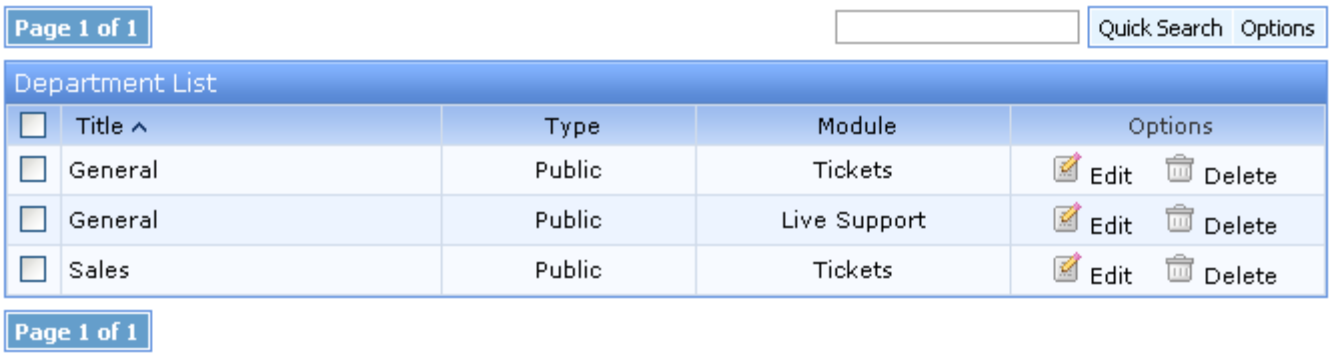
To view and manage departments:

1. Click on the **Departments** tab on the navigation menu bar, as shown below.



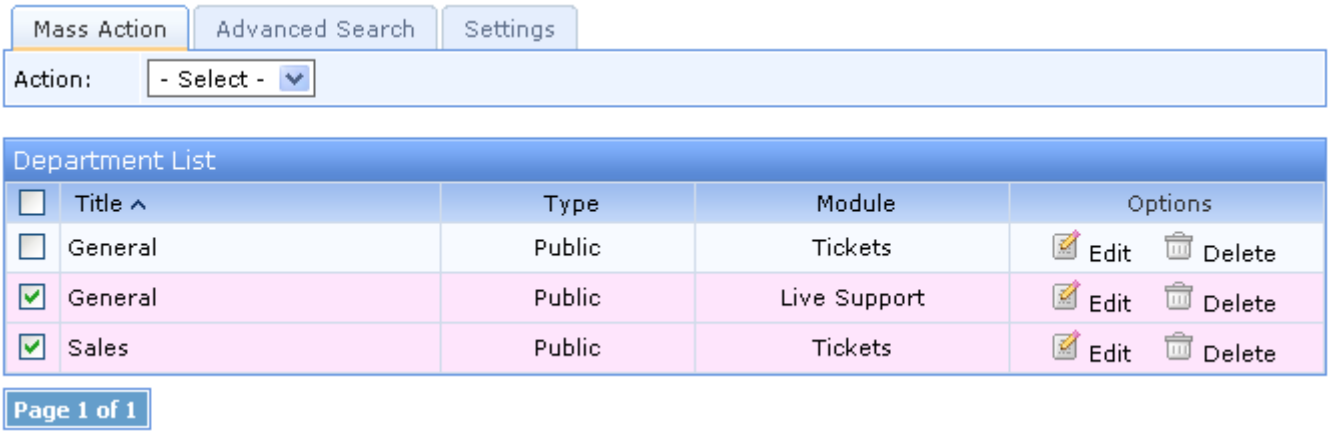
2. Click on **Manage Departments**.

You will be presented with a list of the departments currently configured for the system, as shown below.



To **delete** a department, click on the corresponding delete icon.

Selecting multiple departments (by checking the corresponding check boxes, as shown below) will open the mass-management menu, as shown below. Using this menu, departments can be mass-deleted. Under the **Advanced Search** tab, departments can be searched for by title or by type. Under the **Settings** tab, the number of departments shown per page (if there are many) can be limited.



To **edit** a department, click on the corresponding edit icon. From here, you can configure settings specific to this department.

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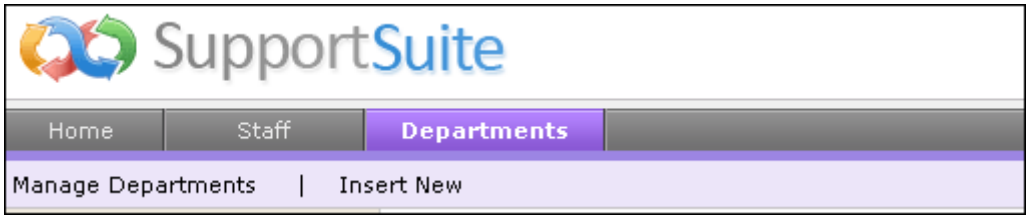
Refer to department fields for documentation on the required fields for editing a department.

Creating a new department

To create a new department:

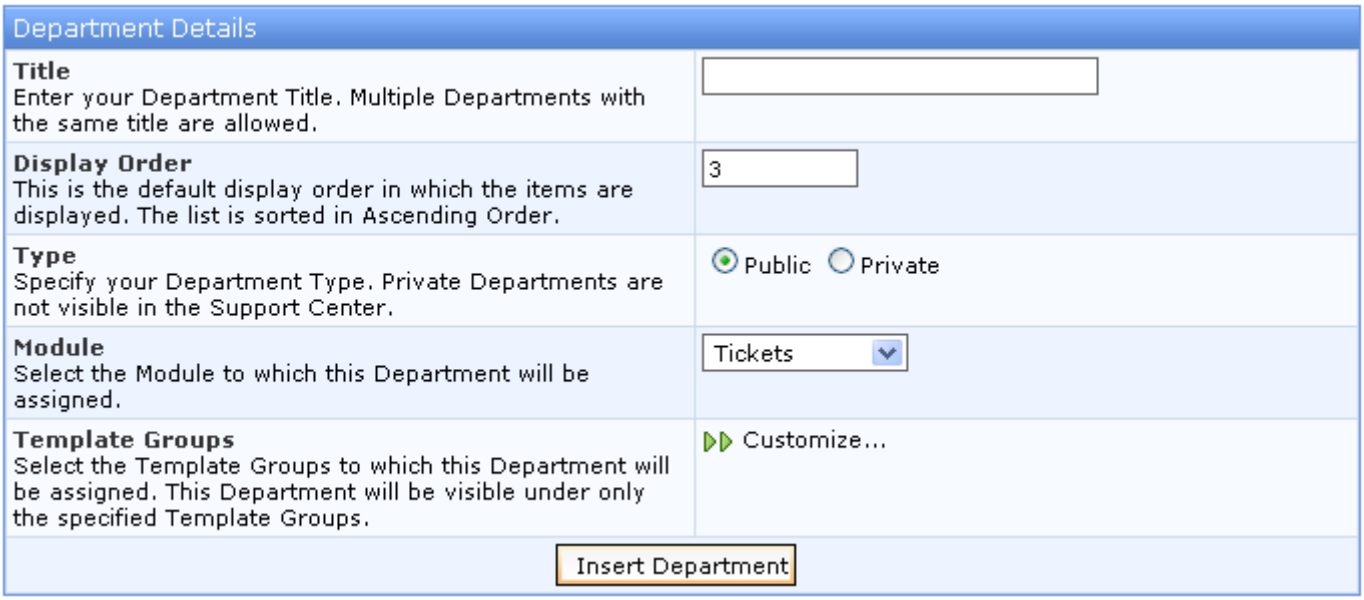
1. Click on the **Departments** tab on the navigation menu bar, as shown below.



2. Click on **Insert New**.

You will be presented with all the configurable settings specific to the new department. Refer to department fields for documentation on the required fields for creating a new department.

Department fields


Department Details
Title
Enter your Department Title. Multiple Departments with the same title are allowed.
Display Order
This is the default display order in which the items are displayed. The list is sorted in Ascending Order.
3
Type
Specify your Department Type. Private Departments are not visible in the Support Center.
Public
Private
Module
Select the Module to which this Department will be assigned.
Tickets
Template Groups
Select the Template Groups to which this Department will be assigned. This Department will be visible under only the specified Template Groups.
Customize...
Insert Department

- **Title** – the title of the department.
- **Display Order** – the display order of the department. This display order will define the order in which the departments are displayed in the client support interface and the staff control panel.
- **Type** – if set to **public**, users will be able to see this department in the client support interface.

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- **Module** – if set to **tickets** (in SupportSuite and eSupport), this department will be a tickets department. If set to **live chat** (in SupportSuite and LiveResponse), the department will be a live chat department.

- **Template Groups** – departments can be set to appear in specific template groups (see template groups). Click on the customize button to expand the templates list. Checking the box corresponding to a template group will cause the department to be available for that template group).

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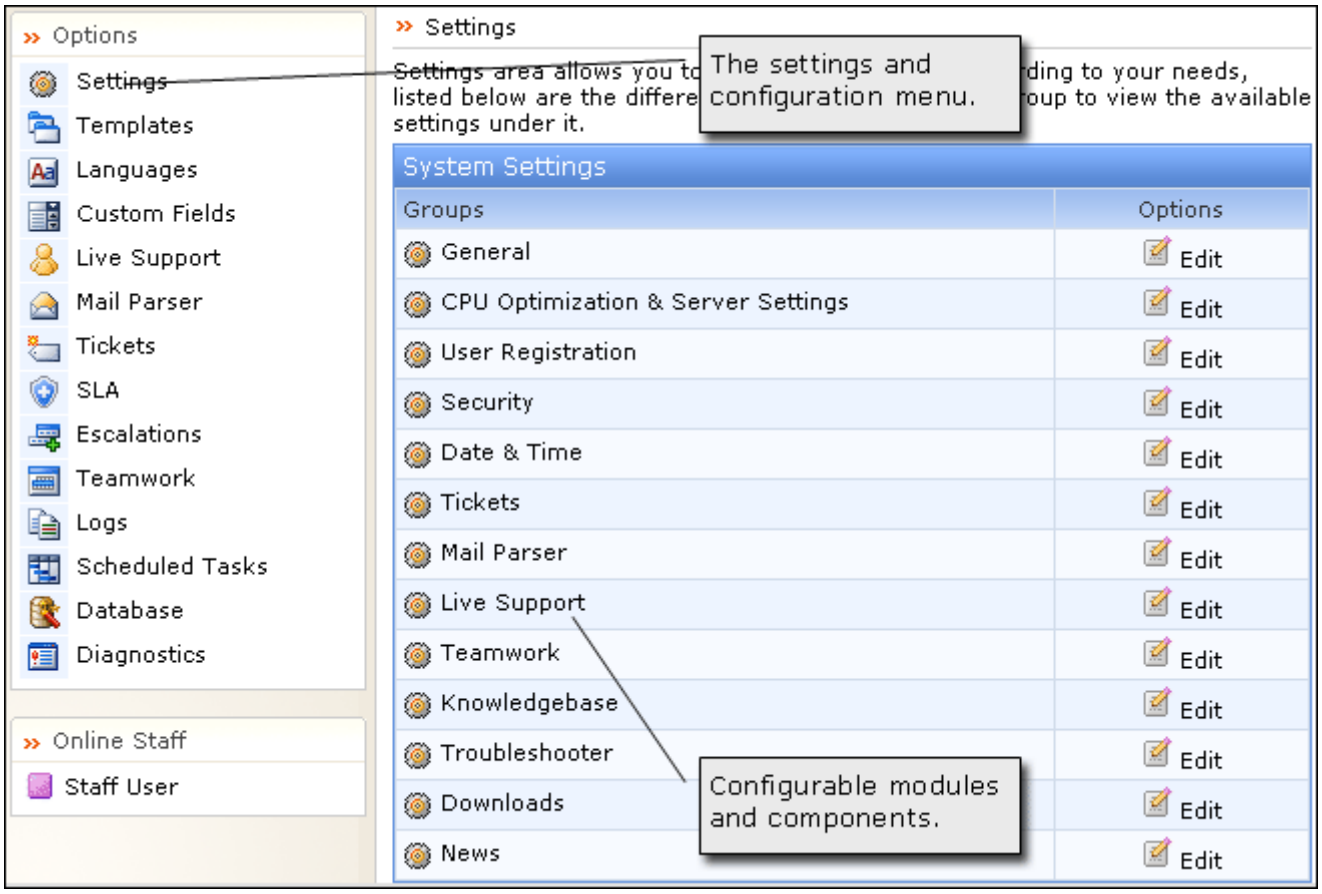
Settings and configuration

The **settings and configuration** area of the **administrator control panel** is a centralized location where all major components and modules that make up SupportSuite can be configured.

To access the settings and configuration area:

1. Click on the **Settings** link on the **Options** menu, as shown below.



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General

Settings for: General
Company Name
Enter your Company Name, This Value is used all over the Client CP and the Outgoing Emails.
Test SupportSuite Company
Product URL
Enter the Full Path to the Product URL, This value should be suffixed with a trailing slash. SupportSuite will not work properly if this is incorrect.
http://www.kayako.com/kayako/
Default Return Email Address
Enter the Default Return Email Address, This Email Address is used as the default "From" address. It should prefereably be same as your Email Queue (If you have one created).
staff@user.com
Redirect Type
Select the Redirect Type, If you select HTML Meta Refresh then you will be presented with a brief text on the action carried out before being redirected.
Header Refresh
Moderate Comments
If Enabled, Any Comments posted by Users will require manual Approval before being viewable on the support desk.
Yes
No

- **Company Name** – this name is used to label the client support interface and is also used as the From Name e-mail field for outgoing e-mails (where a queue override has not been set).
- **Product URL** – the URL to your SupportSuite, eSupport or LiveResponse installation. This URL must be proceeded by a trailing slash.
- **Default Return Email Address** – the default return address. This e-mail address will be used as the default "From" address if no e-mail queues have been created the for the system. It is advisable you use one of the e-mail queues as the *Default Return Email Address*.

  Do not use any staff user's email address who has been assigned to a **Ticket Alert** (see ticket alerts in the staff control panel) as the Default Return Email Address, as it may trigger a mail loop and flood the system.
- **Redirect Type** – the method of redirect, such as after logging into the system. If set toe **HTML Meta Refresh**, a brief text will be displayed before the redirect is made. If set to **Header Refresh**, no text will be displayed and the redirect will occur instantly.
- **Moderate Comments** – if set to **yes**, all comments made to the knowledgebase, news articles and downloads sections will be placed in a moderation queue, and will not appear until they have been approved by a staff user within the staff control panel (for example, see viewing and moderating Knowledgebase user comments in the staff control panel).
- **Tab Menu Navigation Style** – if set the click, navigating through the main menu within the staff control panel (see navigation menu bar in the staff control panel) will involve clicking. If set to hover, all you would need to do to change menu tab is hover over the menu item.
- **Client Support Center Navigation Bar Orientation** – if set to right, the navigation bar will be oriented to the right-hand-side of the client support interface (as shown at the end of this section).

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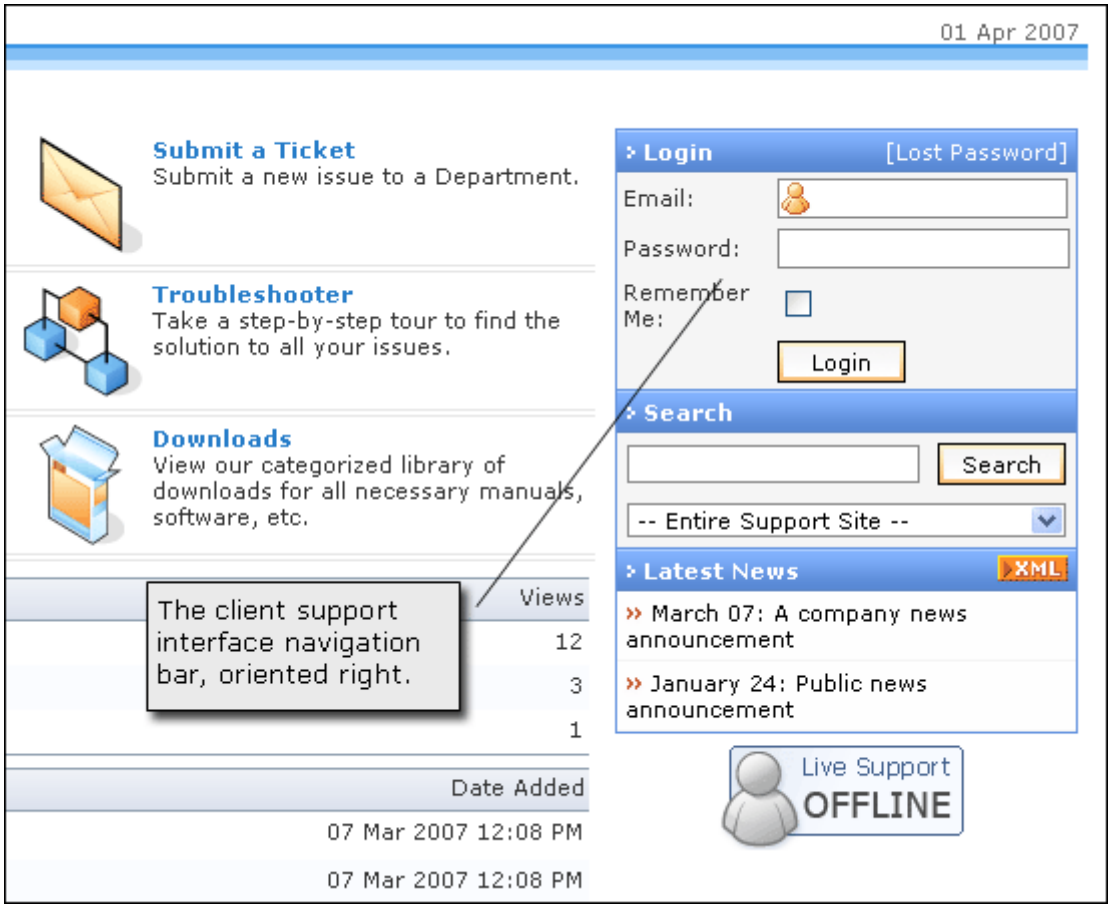
- **Enable Extended Display for Client Support Center Theme** –if enabled, the theme of the client support interface will be fluid (it will take up 100% of the browser's width, as opposed to fixed width).
- **Enable JavaScript Cache for Theme Items** – if enabled, the contents of JavaScript menus will be generated once and then cached. This saves on server load, because the menus do not need to be generated on-the-fly.
- **Display Online Users in Staff CP** – if enabled, staff users logged into the staff control panel, administrator control panel or LiveResponse Client Application will be listed (see staff status menu in the staff control panel).

Click on the **Update Settings** button to save the setting changes.



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CPU optimization and server settings

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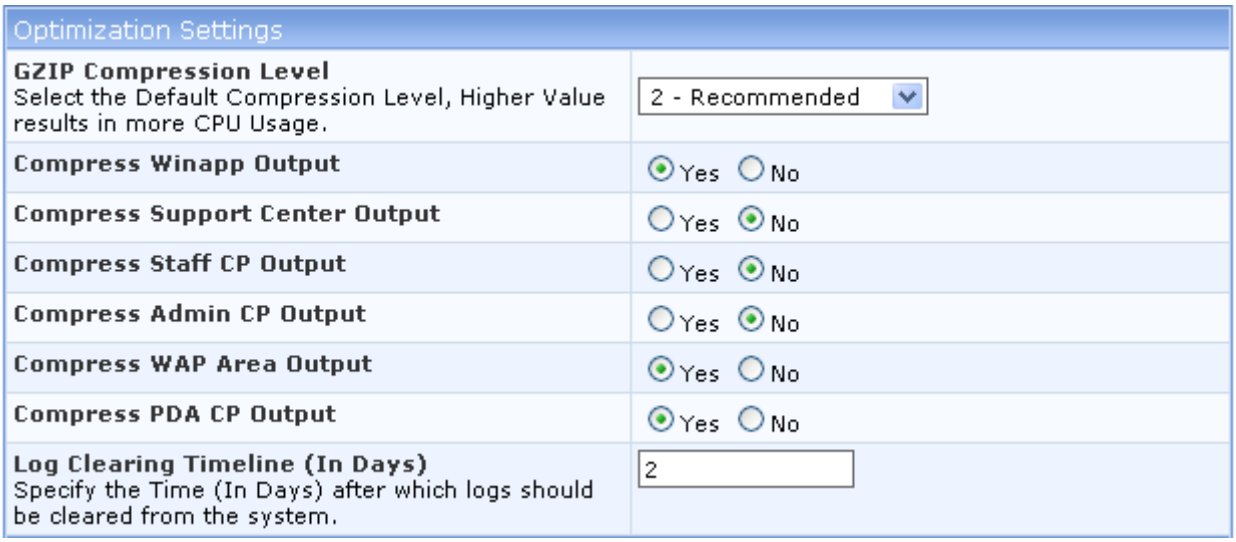
Optimization settings



- **GZIP Compression Level** – the level of compression used to compress data before it is sent to the browser. It is recommended this be left to 2 – if the levels are too high, you may risk exhausting server CPU resources. A higher level on compression will improve page loading times considerable.
- **Compress Winapp Output** – if enabled, the information sent from the server to the LiveResponse Client Application will be compressed.
- **Compress Support Center Output** – if enabled, the information sent from the server to the browser of the client (when browsing the client support interface) will be compressed.
- **Compress Staff CP Output** – if enabled, the staff control panel pages will be compressed before being sent to the staff user's browser.
- **Compress Admin CP Output** – if enabled, the administrator control panel pages will be compressed before being sent to the staff user's browser.
- **Compress WAP Area Output** – if enabled, the information sent from the server to the staff user's cellular mobile phone will be compressed.
- **Compress PDA CP Output** – if enabled, the information sent from the server to the staff user's mobile device (such as a PDA or Pocket PC) will be compressed.
- **Log Clearing timeline (In Days)** – the time after which logs will be purged from the system (such as mail parser logs and task logs).

For more information on how to further tweak settings to affect your server performance, see what settings will directly affect the performance of my server in the frequently asked questions.

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SMS Gateway

For more information on the SMS gateway, see Kayako SMS gateway.

SMS Gateway
Enable SMS Gateway
Toggle the Enabling of SMS Gateway, Kayako has its own SMS Gateway allowing you to receive Alerts right to your cell phone. For more information please visit http://gateway.kayako.net
Yes
No
Email Failure Reports
If Enabled, Any SMS Delivery Failure reports will be automatically dispatched to Primary Admin user email.
Yes
No
Gateway Username
Enter your Kayako SMS Gateway Username, This is your Email Address to http://members.kayako.net
Gateway Password
Enter your Gateway Password
Outgoing Mail Settings
Enable HTML Emails
If Enabled, All Outgoing Mails will be dispatched as HTML. SupportSuite will also send a Text version of the Email as MIME Part to allow Email Clients that do not support HTML to view the email. You can edit all the Emails under Templates > Manage Templates.
Yes
No
Enable Mail Queue
Enable/Disable the Email Queue. SupportSuite has a feature called Email Queues that sends bulk emails in batches. This prevents slowing down of pages and the mails are sent over a period of time.
Yes
No
Number of Mails to Send in a Queue Batch
Number of Mails to Send in One Batch. The Higher the Value, The slower the page loading might be.
5

- **Enable SMS Gateway** – if enabled, SMS alerts can be configured as ticket alerts within the staff control panel.
- **Email Failure Reports** – if enabled, failure reports will be e-mailed to the primary administrator e-mail address.
- **Gateway Username** – your Kayako Member's Area e-mail address (login name).
- **Gateway Password** – your Kayako Member's Area password.

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Outgoing Mail Settings

SMS Gateway
Enable SMS Gateway
Toggle the Enabling of SMS Gateway, Kayako has its own SMS Gateway allowing you to receive Alerts right to your cell phone. For more information please visit http://gateway.kayako.net
Yes
No
Email Failure Reports
If Enabled, Any SMS Delivery Failure reports will be automatically dispatched to Primary Admin user email.
Yes
No
Gateway Username
Enter your Kayako SMS Gateway Username, This is your Email Address to http://members.kayako.net
Gateway Password
Enter your Gateway Password
Outgoing Mail Settings
Enable HTML Emails
If Enabled, All Outgoing Mails will be dispatched as HTML. SupportSuite will also send a Text version of the Email as MIME Part to allow Email Clients that do not support HTML to view the email. You can edit all the Emails under Templates > Manage Templates.
Yes
No
Enable Mail Queue
Enable/Disable the Email Queue. SupportSuite has a feature called Email Queues that sends bulk emails in batches. This prevents slowing down of pages and the mails are sent over a period of time.
Yes
No
Number of Mails to Send in a Queue Batch
Number of Mails to Send in One Batch. The Higher the Value, The slower the page loading might be.
5

- **Enable HTML Enables** – if enabled, all outgoing e-mails will use the HTML templates as opposed to the plain-text templates.
- **Enable Mail Queue** – if enabled, the e-mail queue will be activated. This is an internal queuing system that prevents SupportSuite flooding e-mails out of the server.
- **Number of Mails to Send in a Queue Batch** – if the **Mail Queue** is enabled, this number of e-mails will be sent per patch. This must not be set too high, otherwise page loading may slow down.

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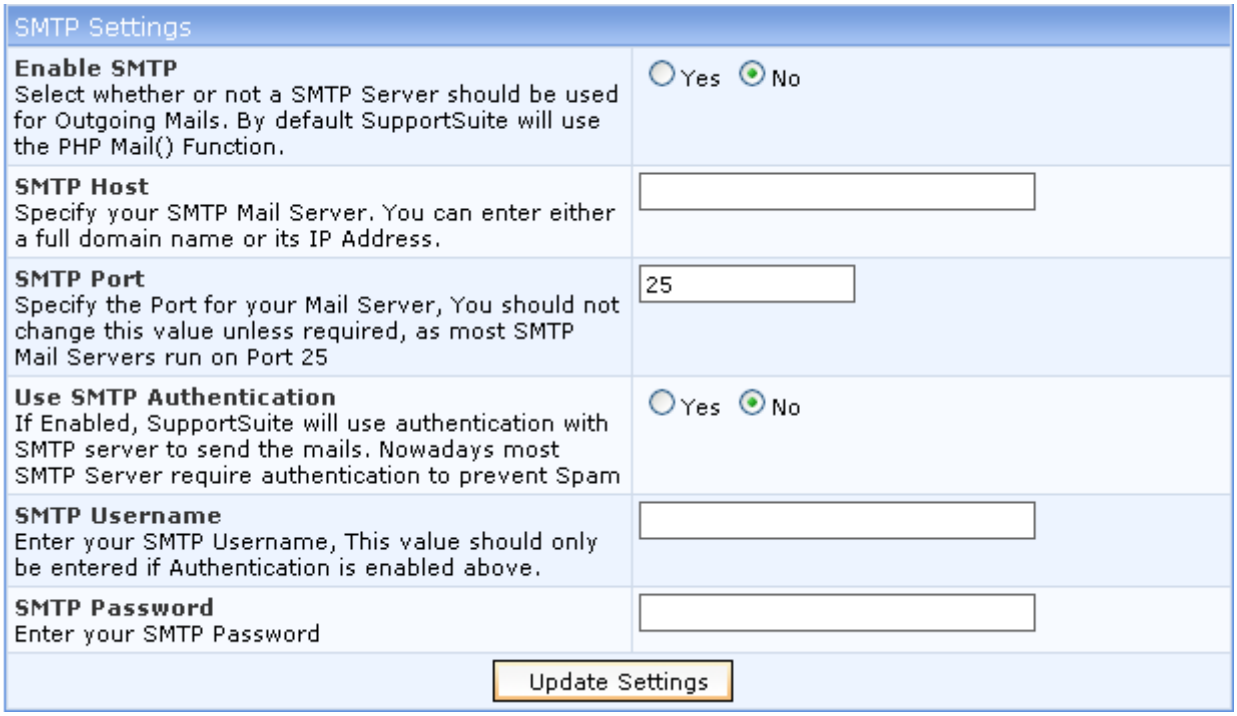
SMTP Settings


SMTP Settings
Enable SMTP
Select whether or not a SMTP Server should be used for Outgoing Mails. By default SupportSuite will use the PHP Mail() Function.
Yes
No
SMTP Host
Specify your SMTP Mail Server. You can enter either a full domain name or its IP Address.
SMTP Port
Specify the Port for your Mail Server, You should not change this value unless required, as most SMTP Mail Servers run on Port 25
25
Use SMTP Authentication
If Enabled, SupportSuite will use authentication with SMTP server to send the mails. Nowadays most SMTP Server require authentication to prevent Spam
Yes
No
SMTP Username
Enter your SMTP Username, This value should only be entered if Authentication is enabled above.
SMTP Password
Enter your SMTP Password
Update Settings

- **Enable SMTP** – if you would like to use an external SMTP server instead of the local PHP mail() function, enable this setting. If disabled, you can ignore the following SMTP settings.
- **SMTP Host** – the host of the external SMTP server. Only required if you have **Enabled SMTP** (above).
- **SMTP Port** – the SMTP port of the external SMTP server.
- **Use SMTP Authentication** – if disabled, anonymous login will be used to connect to the SMTP server. If disabled, you can ignore the following SMTP login settings.
- **SMTP Username** – the username used to connect to the SMTP server.
- **SMTP Password** – the password associated with the above username.

Click on the **Update Settings** button to save the setting changes.

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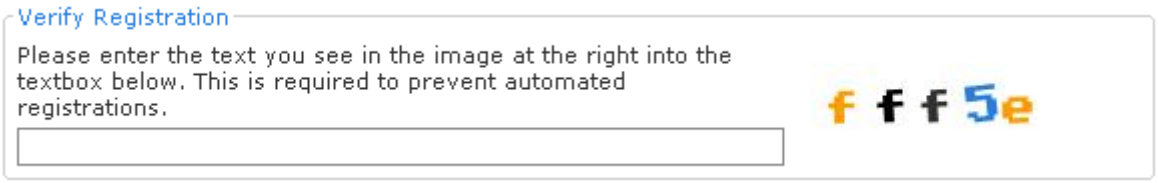
User registration

For more information on the client user database, see users and groups in the staff control panel.

- **Enabled Manual Staff Verification** – if enabled, users will not be able to login or use their support desk user accounts until a staff member has manually approved the new account, via the staff control panel (see managing user accounts in the staff control panel).
- **Enable Email Verification** – if enabled, users will be required to validate their e-mail address by visiting a validation link, sent to them automatically after they have completed registration.
- **Enable Image Verification (CAPTCHA)** – if enabled, users will be required to enter the text into a text field of a visually distorted image. This is an effort to prevent automatic registrations. An example of image verification is shown below.


Verify Registration
Please enter the text you see in the image at the right into the textbox below. This is required to prevent automated registrations.

- **Send Password in Auto Responder Message** – if enabled, the user will be reminded of their client support interface password every time their raise a new ticket and receive a ticket Autoresponder.

Auto Clear

- **Automatically Clear Unverified Users** – if enabled, users who have failed to verify their e-mail address or have not been manually validated by a staff user will be cleared.
- **Auto Clear Timeline (In Days) –** if automatic clearing of unvalidated user accounts is enabled (above), this value represents how many days apart each purge will take place.

Click on the **Update Settings** button to save the setting changes.

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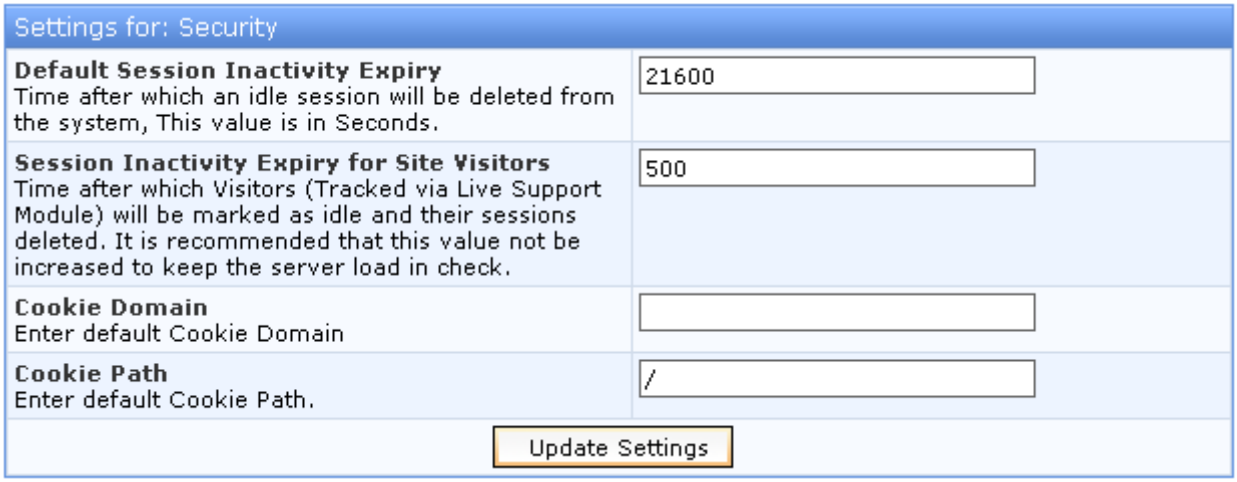
Security


Settings for: Security
Default Session Inactivity Expiry
Time after which an idle session will be deleted from the system, This value is in Seconds.
21600
Session Inactivity Expiry for Site Visitors
Time after which Visitors (Tracked via Live Support Module) will be marked as idle and their sessions deleted. It is recommended that this value not be increased to keep the server load in check.
500
Cookie Domain
Enter default Cookie Domain
Cookie Path
Enter default Cookie Path.
/
Update Settings

- **Default Session Inactivity Expiry** – if a user or staff user's login session has been inactive for this length of time (in seconds), the session will be cleared and the user required to log in again.
- **Session Inactivity Expire for Site Visitors** – the time (in seconds) after which visitors tracked by the LiveResponse Client Application are considered inactive, and their tracking stopped.
- **Cookie Domain** – the cookie domain that cookies will be created for each user. If you have not installed of SupportSuite, eSupport or LiveResponse on a sub-domain then this should be left as default. If you have installed the software on a sub-domain, enter the sub-domain preceded by a "dot" here (for example: .subdomain.domain.com). If you use **just** your domain (**.example.com**), then the cookie will be made available for all sub-domains of this domain.
- **Cookie Path** – the cookie path that cookies will be created for each user. If you are not running more than one installation of SupportSuite, eSupport or LiveResponse on the same server, it is recommended this be left as default.

Click on the **Update Settings** button to save the setting changes.

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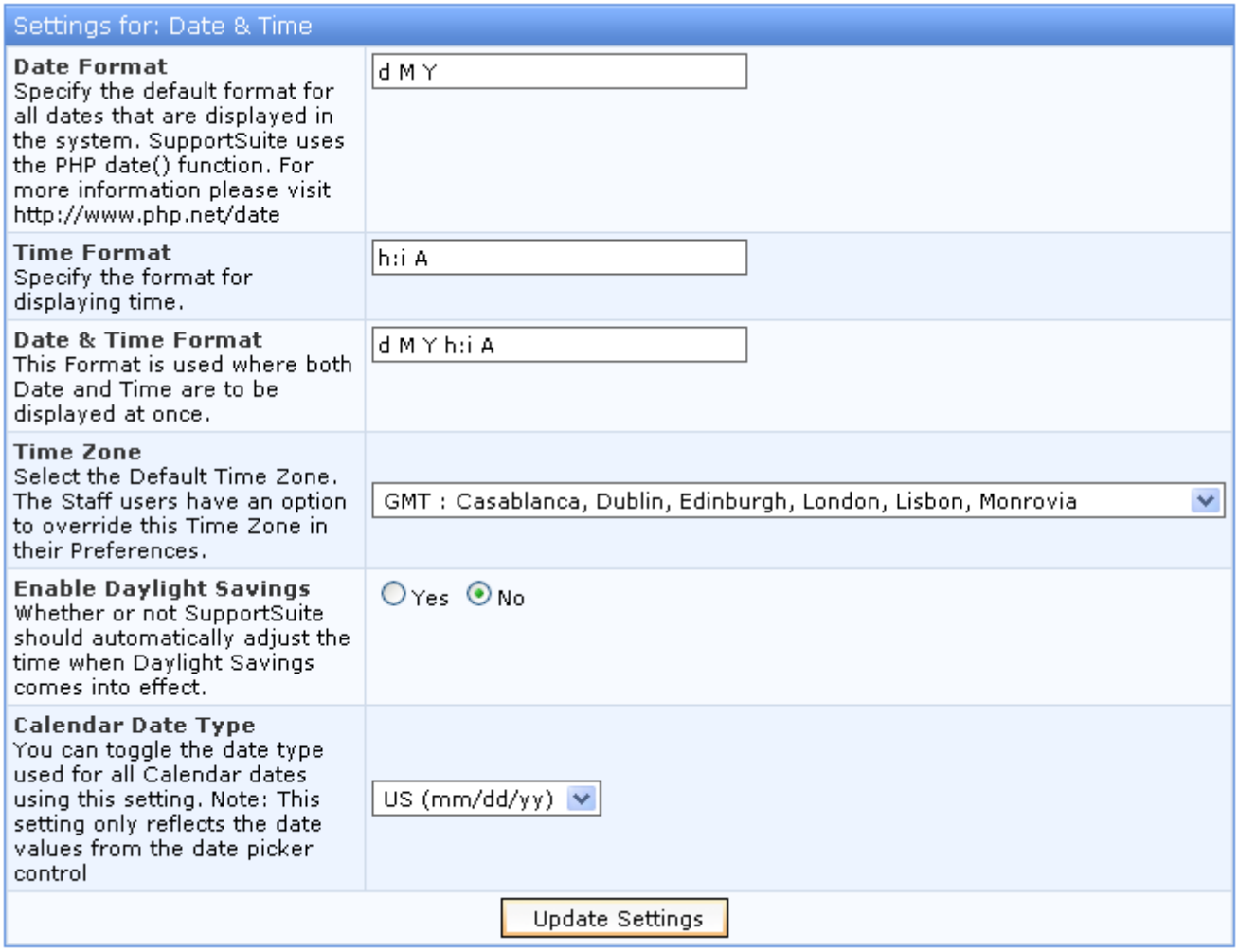
Date and time


Settings for: Date & Time
Date Format
Specify the default format for all dates that are displayed in the system. SupportSuite uses the PHP date() function. For more information please visit http://www.php.net/date
d M Y
Time Format
Specify the format for displaying time.
h:i A
Date & Time Format
This Format is used where both Date and Time are to be displayed at once.
d M Y h:i A
Time Zone
Select the Default Time Zone. The Staff users have an option to override this Time Zone in their Preferences.
GMT : Casablanca, Dublin, Edinburgh, London, Lisbon, Monrovia
Enable Daylight Savings
Whether or not SupportSuite should automatically adjust the time when Daylight Savings comes into effect.
Yes
No
Calendar Date Type
You can toggle the date type used for all Calendar dates using this setting. Note: This setting only reflects the date values from the date picker control
US (mm/dd/yy)
Update Settings

- **Date format** – specify the format of all dates that are displayed throughout the system. This value should accord to the PHP date() function, documented at www.php.net/date.
- **Time Format** – the format for all times that are displayed throughout the system. This value should accord to the PHP date() function, documented at www.php.net/date.
- **Date & Time Format** – the format that all dates and times (displayed at once) are displayed throughout the system. This value should accord to the PHP date() function, documented at www.php.net/date.
- **Time Zone** – specify the default time zone here. Each staff user can configure their own local time-zone under the staff user preferences (for more information, see staff user preferences in the staff control panel).
- **Enable Daylight Savings** – if enabled, the system will automatically adjust each time value when daylight savings time comes into affect.
- **Calendar Date Type** – the format of the calendar date, shown on date pickers throughout the system.

Click on the **Update Settings** button to save the setting changes.

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Tickets

For more information on tickets, see tickets in the staff control panel.

General Ticket Settings

Settings for: Tickets
General Ticket Settings
Display Tickets Tab
Toggle the Display of Tickets Tab in Staff CP
Yes No
Send Complete History in Staff Replies?
This option enables sending of complete history of the ticket in all Staff replies.
Note: This option adds extra overhead in the execution of reply routines
Yes No
Enable Pagination for Ticket Posts
This Option allows you to Enable/Disable Pagination for Ticket Posts. Pagination splits up different posts into different pages with each page having a specified number of posts.
Yes No
Require Valid Email
If Enabled, The user will be required to have a valid email when submitting a ticket or authenticating using LoginShare plugins
Yes No
Add Merged Ticket Emails as Recipients?
If Enabled, the user emails will automatically be added as a recipient when two tickets are merged allowing all users to receive ticket correspondence.
Yes No
Number of Posts Per Page in View Ticket Page
Enter the Number of Posts displayed on one Page in the View Ticket page, This option applies only to Staff CP.
5
Order of Display for Ticket Posts
Select the Display Order for Ticket Posts under the View Ticket Page.
Oldest First
Post Text Conversion
This Option allows you to prevent any XSS attacks by converting any HTML codes to their respective entities, It is highly recommended that this option not be changed to "No Processing" as it can allow your clients to run arbitary script code on staff browser.
Strip Tags

- **Display Tickets Tab** – if enabled, the tickets tab will be displayed and accessible within the staff control panel (see navigation menu bar in the staff control panel).
- **Send Complete History in staff Replies**? – if enabled, an entire post history of all posts made within a ticket will be sent with each staff reply. This may make e-mails very large (if the ticket is long) and will increase the reply sending time.
- **Enable Pagination for Ticket Posts** – if enabled, ticket postings will be paginated across a number of pages (for example, 10 ticket posts per page can be displayed when viewing a ticket).
- **Require Valid Email** – if enabled, the user will be required to use a valid e-mail address when submitting tickets or logging into the client support interface.
- **Add Merged Ticket Emails as Recipients**? – when merging tickets, more than one e-mail address for correspondence may be recorded (such as if each ticket creator is different). In such a case, if this option is enabled any e-mail addresses (such as CC, BCC and third-party recipient addresses) will be added as recipient users for the newly merged ticket. For more

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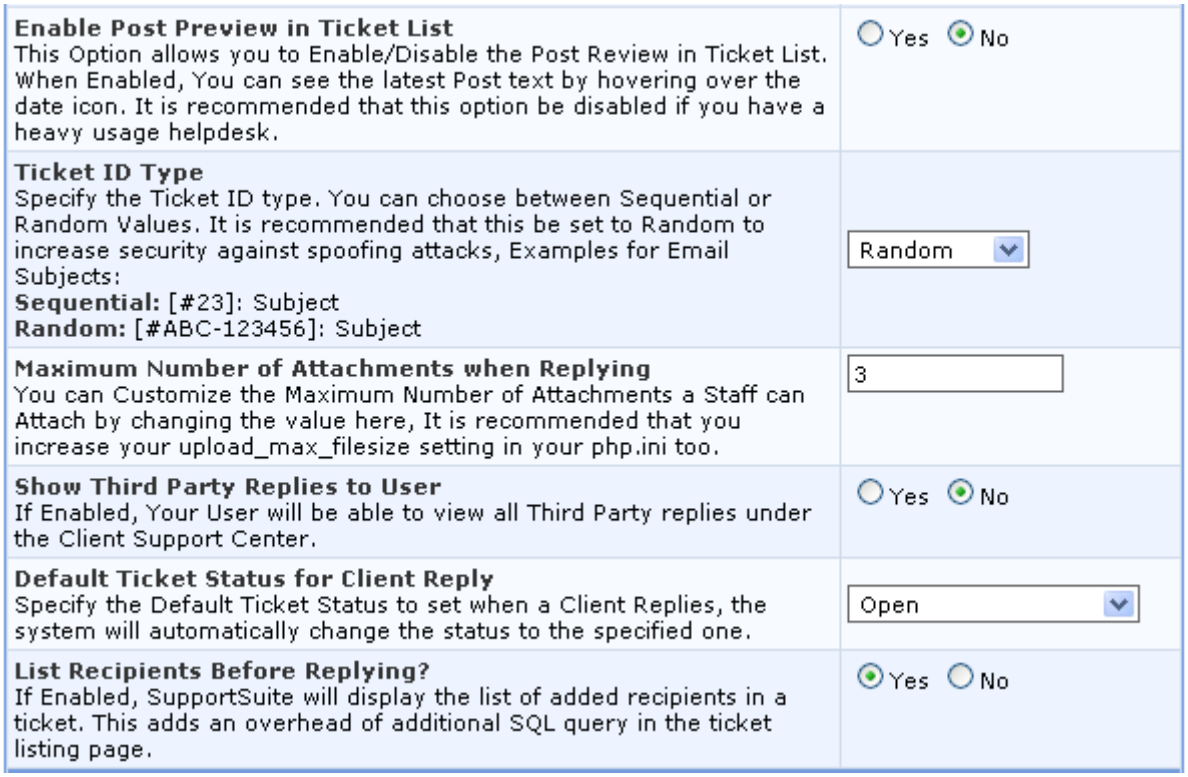
information, see CC, BCC and third party recipients in the staff control panel.

- **Number of Posts Per Page in View ticket Page** – the number of posts to be displayed per paginated page when viewing a ticket (this setting depends on the *Enable Pagination for Ticket Posts* setting).
- **Order of Display for Ticket Posts** – the order of display for ticket posts when viewing tickets in the staff control panel.
- **Post Text Conversion** - this setting represents the level of tag processing when a ticket's contents is parsed.


Enable Post Preview in Ticket List
This Option allows you to Enable/Disable the Post Review in Ticket List. When Enabled, You can see the latest Post text by hovering over the date icon. It is recommended that this option be disabled if you have a heavy usage helpdesk.
Yes
No
Ticket ID Type
Specify the Ticket ID type. You can choose between Sequential or Random Values. It is recommended that this be set to Random to increase security against spoofing attacks, Examples for Email Subjects:
Sequential: [#23]: Subject
Random: [#ABC-123456]: Subject
Random
Maximum Number of Attachments when Replying
You can Customize the Maximum Number of Attachments a Staff can Attach by changing the value here, It is recommended that you increase your upload_max_filesize setting in your php.ini too.
3
Show Third Party Replies to User
If Enabled, Your User will be able to view all Third Party replies under the Client Support Center.
Yes
No
Default Ticket Status for Client Reply
Specify the Default Ticket Status to set when a Client Replies, the system will automatically change the status to the specified one.
Open
List Recipients Before Replying?
If Enabled, SupportSuite will display the list of added recipients in a ticket. This adds an overhead of additional SQL query in the ticket listing page.
Yes
No

- **Enable Post Preview in Ticket List** – when viewing a ticket list in the staff control panel, a preview of a ticket's contents can be viewed by hovering the mouse over a ticket. If enabled, this functionality will be present. Enabling this setting may increase the server load when listing tickets, particularly on a heavy-usage support desk.
- **Ticket ID Type** – if set to random, each newly created ticket will be assigned a random ticket ID. If set to sequential, the ticket ID will start at 1 and increase from this value. It is recommended this value be set to random, so to prevent people trying to spoof the ticketing system by guessing a sequentially generated ticket ID.
- **Maximum Number of Attachments when Replying** – the maximum number of attachments that a staff user can attach to a ticket reply is. When setting to a high number, it is recommended that you increase the upload_max_filesize setting in your php.ini, to account for the larger upload batch.
- **Show Third Party Replies to User** – if enabled, the user will be able to see third party recipient replies when viewing a ticket in the client support interface. For more information on third part recipients, see CC, BCC and third party recipients in the staff control panel.

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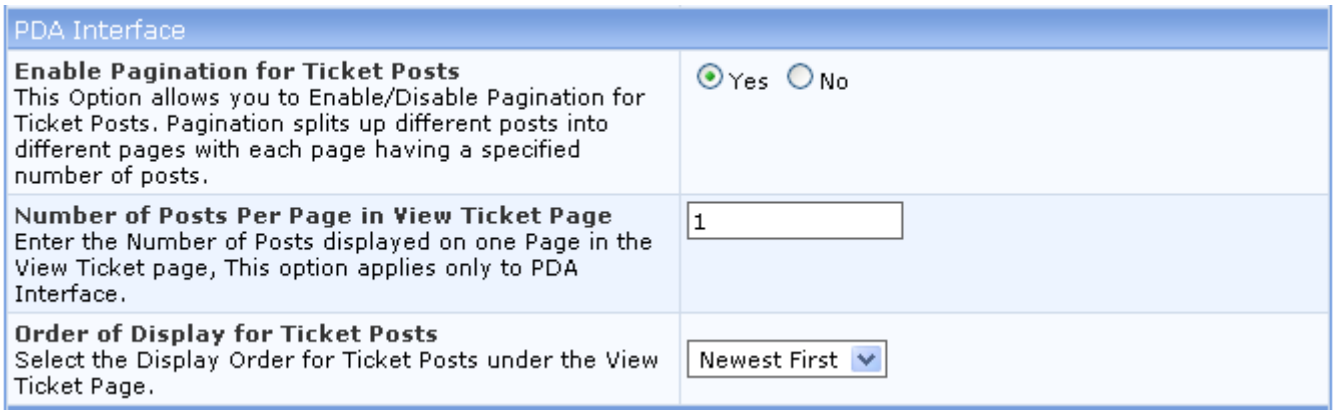
- **Default Ticket Status for Client Reply** – this status (such as open, closed and on-hold) is the default status that a ticket is set to when a client replies. For example if this value is set to **Open**, if a client makes a reply to an on-hold ticket it's status will be set to open.

- **List Recipients Before Replying?** – if enabled, a list of all additional recipients (such as CC, BCC and third party recipients (see CC, BCC and third party recipients in the staff control panel)) will be listed before a reply is made.

PDA Interface

These settings affect the PDA interface to the staff control panel.

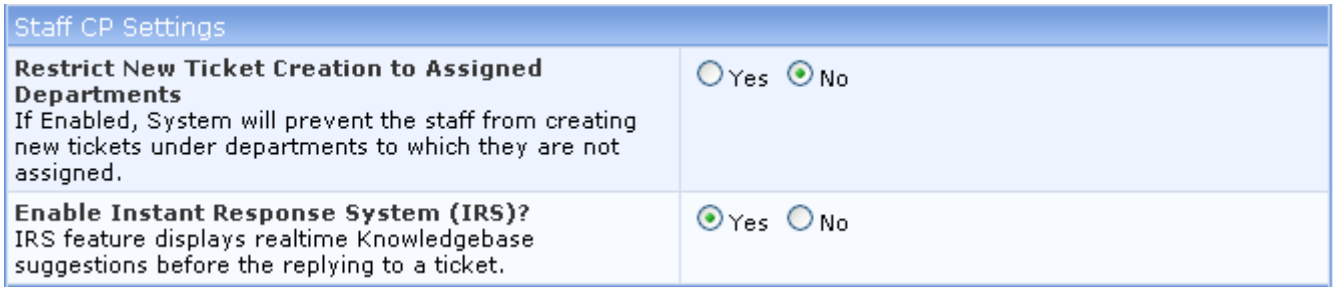

PDA Interface
Enable Pagination for Ticket Posts
This Option allows you to Enable/Disable Pagination for Ticket Posts. Pagination splits up different posts into different pages with each page having a specified number of posts.
Yes
No
Number of Posts Per Page in View Ticket Page
Enter the Number of Posts displayed on one Page in the View Ticket page, This option applies only to PDA Interface.
1
Order of Display for Ticket Posts
Select the Display Order for Ticket Posts under the View Ticket Page.
Newest First

- **Enable Pagination for Ticket Posts** – if enabled, ticket postings will be paginated across a number of pages (for example, 10 ticket posts per page can be displayed when viewing a ticket).

- **Number of Posts Per Page in View ticket Page** – the number of posts to be displayed per paginated page when viewing a ticket (this setting depends on the *Enable Pagination for Ticket Posts setting*).

- **Order of Display for Ticket Posts** – the order of display for ticket posts when viewing tickets in PDA interface to the staff control panel.

Staff CP Settings


Staff CP Settings
Restrict New Ticket Creation to Assigned Departments
If Enabled, System will prevent the staff from creating new tickets under departments to which they are not assigned.
Yes
No
Enable Instant Response System (IRS)?
IRS feature displays realtime Knowledgebase suggestions before the replying to a ticket.
Yes
No

- **Restrict New Ticket Creation to Assigned Departments** – if enabled, staff users will not be able to create new tickets inside departments to which they are not assigned (see creating a ticket – sending an e-mail in the staff control panel).

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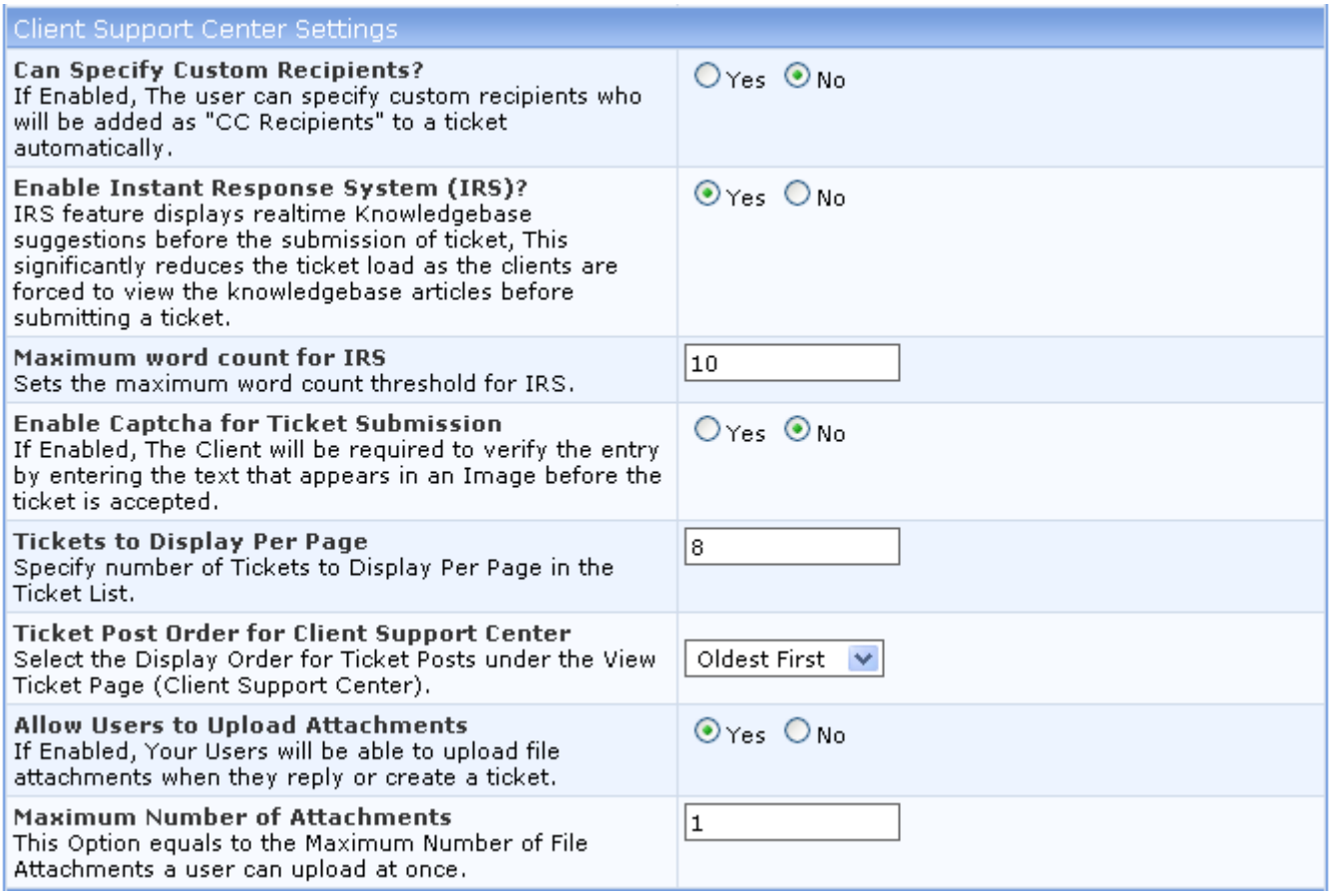
- **Enable Instant Response System (IRS)**? – if enabled, suggested knowledgebase articles will display in real-time search underneath the staff's reply interface, according to what is being typed. The articles that appear may be of relevance and use to what the staff user is trying to communicate.

Client Support Center Settings


Client Support Center Settings
Can Specify Custom Recipients?
If Enabled, The user can specify custom recipients who will be added as "CC Recipients" to a ticket automatically.
Yes
No
Enable Instant Response System (IRS)?
IRS feature displays realtime Knowledgebase suggestions before the submission of ticket, This significantly reduces the ticket load as the clients are forced to view the knowledgebase articles before submitting a ticket.
Yes
No
Maximum word count for IRS
Sets the maximum word count threshold for IRS.
10
Enable Captcha for Ticket Submission
If Enabled, The Client will be required to verify the entry by entering the text that appears in an Image before the ticket is accepted.
Yes
No
Tickets to Display Per Page
Specify number of Tickets to Display Per Page in the Ticket List.
8
Ticket Post Order for Client Support Center
Select the Display Order for Ticket Posts under the View Ticket Page (Client Support Center).
Oldest First
Allow Users to Upload Attachments
If Enabled, Your Users will be able to upload file attachments when they reply or create a ticket.
Yes
No
Maximum Number of Attachments
This Option equals to the Maximum Number of File Attachments a user can upload at once.
1

- **Can Specify Custom Recipients?** – if enabled, the client (when creating a ticket via the client support interface) can specify additional third party recipients for the ticket. For more information on third part recipients, see CC, BCC and third party recipients in the staff control panel.

- **Enable Instant Response System (IRS)?** – if enabled, suggested knowledgebase articles will display in real-time search underneath the client's ticket field, according to what is being typed. The articles that appear may be of relevance and may find the answer to the client's question before a ticket is submitted.

- **Maximum word count for IRS** – the maximum number of words, after which IRS (Instant Response System) will stop searching the knowledgebase.

- **Enable Captcha for Ticket Submission** – if enabled, users will be required to enter the text into a text field of a visually distorted image. This is an effort to prevent automatic registrations.

- **Tickets to display per page** – the number of tickets the user will see listed when viewing his or her ticket history in the client support interface.

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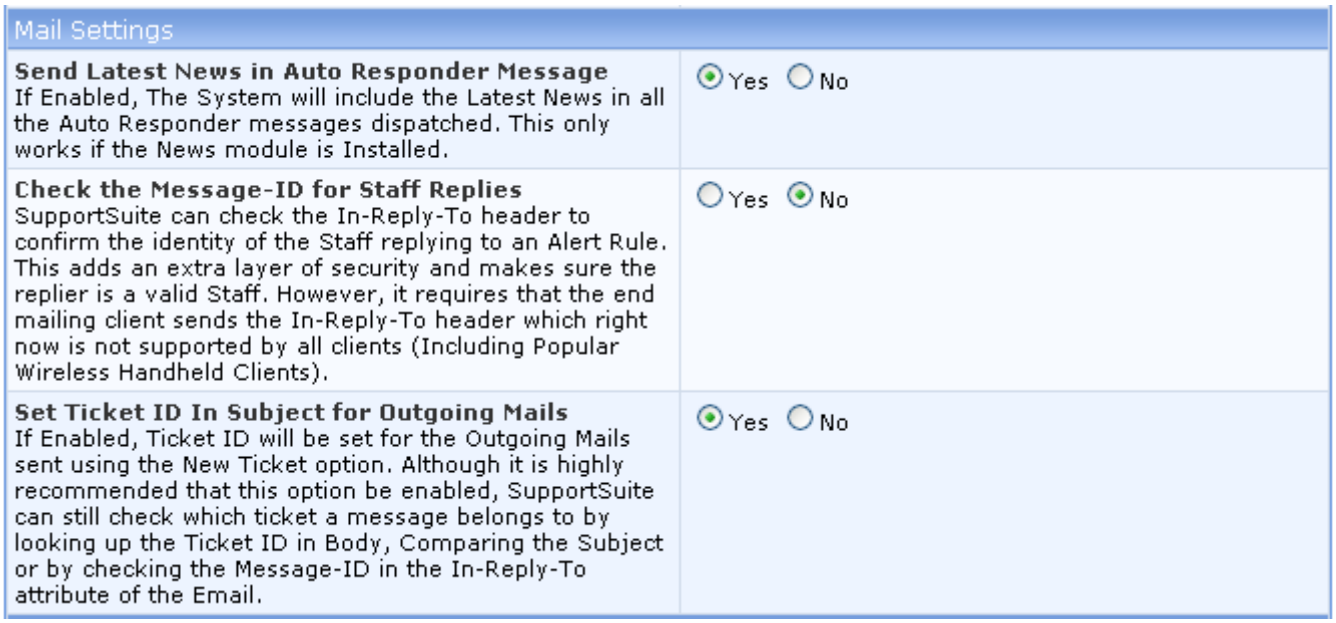
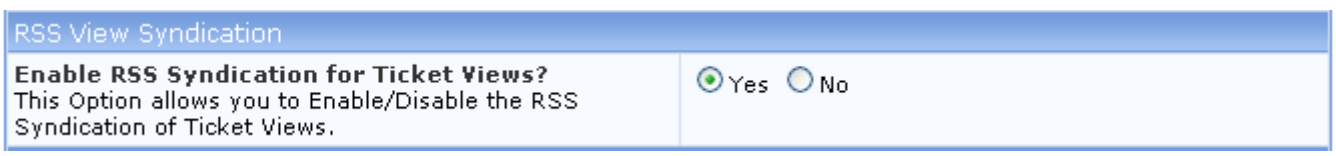
- **Ticket Post Order for Client Support Center** – the order by which tickets will be listed by in the user's ticket history area of the client support interface.
- **Allow Users to Upload Attachments** – if enabled, users will be able to upload files from their computer and attach them to a ticket reply in the client support interface.
- **Maximum Number of Attachments** – the maximum number of files a user can attach to a ticket reply in the client support interface (this setting is dependant on *Allow Users to Upload Attachments*).

Mail Settings


Mail Settings
Send Latest News in Auto Responder Message
If Enabled, The System will include the Latest News in all the Auto Responder messages dispatched. This only works if the News module is Installed.
Yes
No
Check the Message-ID for Staff Replies
SupportSuite can check the In-Reply-To header to confirm the identity of the Staff replying to an Alert Rule. This adds an extra layer of security and makes sure the replier is a valid Staff. However, it requires that the end mailing client sends the In-Reply-To header which right now is not supported by all clients (Including Popular Wireless Handheld Clients).
Yes
No
Set Ticket ID In Subject for Outgoing Mails
If Enabled, Ticket ID will be set for the Outgoing Mails sent using the New Ticket option. Although it is highly recommended that this option be enabled, SupportSuite can still check which ticket a message belongs to by looking up the Ticket ID in Body, Comparing the Subject or by checking the Message-ID in the In-Reply-To attribute of the Email.
Yes
No

- **Send Latest News in Auto Responder Message** – if enabled, the latest news announcements will be listed in the ticket autoresponder, sent to a user after raising a new ticket.
- **Check the Message-ID for Staff Replies** – enabling this setting adds an extra layer of security and makes sure the replier is a valid staff user. However, it requires that the end mailing client sends the In-Reply-To header which right now is not supported by all clients (including popular wireless handheld clients). This setting is related to *the Enable Two Way Email Processing* setting.
- **Set Ticket ID In Subject for Outgoing Mails** – if enabled, the ticket ID will be prepended to the outgoing e-mail's subject. It is highly recommended this setting be enabled, so to ensure the system can track which replies belong to what tickets.

RSS View Syndication


RSS View Syndication
Enable RSS Syndication for Ticket Views?
This Option allows you to Enable/Disable the RSS Syndication of Ticket Views.
Yes
No

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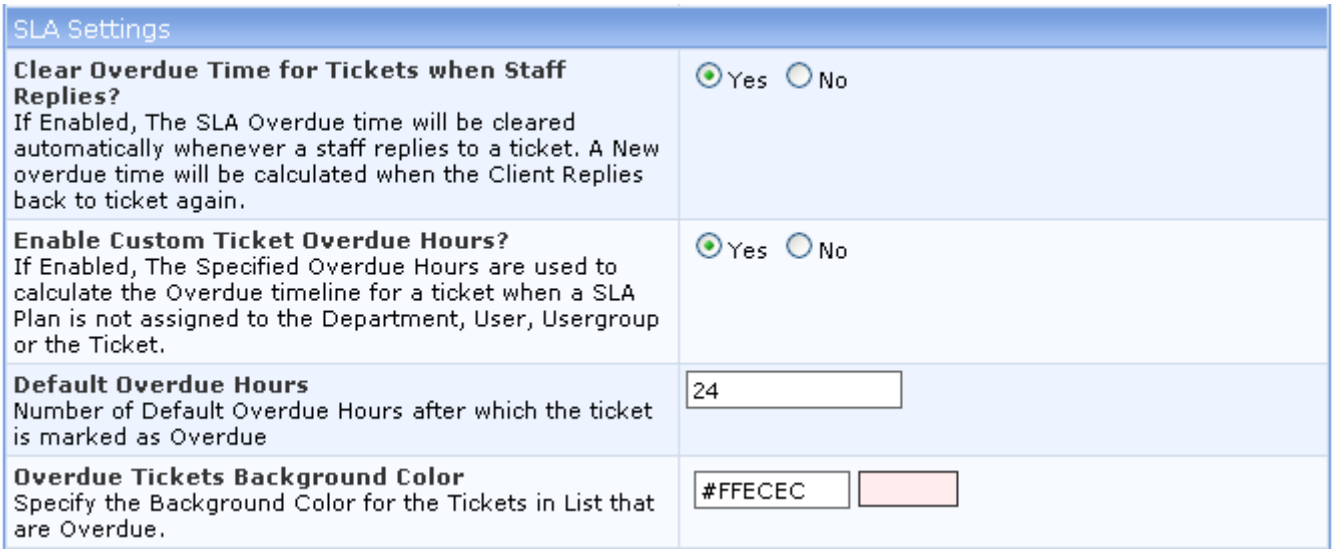
- **Enable RSS Syndication for Ticket Views?** – if enabled, RSS syndication of ticket lists within the staff control panel will be activated (see RSS feeds of tickets in the staff control panel). Also see what is an RSS feed, in the frequently asked questions.

SLA Settings


SLA Settings
Clear Overdue Time for Tickets when Staff Replies?
If Enabled, The SLA Overdue time will be cleared automatically whenever a staff replies to a ticket. A New overdue time will be calculated when the Client Replies back to ticket again.
Yes
No
Enable Custom Ticket Overdue Hours?
If Enabled, The Specified Overdue Hours are used to calculate the Overdue timeline for a ticket when a SLA Plan is not assigned to the Department, User, Usergroup or the Ticket.
Yes
No
Default Overdue Hours
Number of Default Overdue Hours after which the ticket is marked as Overdue
24
Overdue Tickets Background Color
Specify the Background Color for the Tickets in List that are Overdue.
#FFECEC

- **Clear Overdue Time for Tickets when Staff Replies?** – if enabled, a ticket's due time will be automatically cleared when a staff makes a reply to the ticket.
- **Enable Custom Ticket Overdue Hours?** – if no SLA plan has been assigned to the ticket, user or department, a custom **overdue hours** value (see the *Default Overdue Hours* setting).
- **Default Overdue Hours** – the default number of overdue hours set for a ticket when no SLA plan is attached to the ticket, user or department.
- **Overdue Tickets Background Color** – when tickets become marked as overdue, the background color of their table row in a ticket listing changes. The color (hex) value can be set here. For more information on ticket overdue times, see ticket due times in the staff control panel.

Parser Settings

Parser Settings
Auto Add CC Users as CC Recipients
If Enabled, System will automatically add additional recipients in an incoming email as CC Recipients
Yes
No
Enable Two Way Email Processing
This option allows a Staff to reply to incoming Alerts. That reply is then added into the database as a Staff reply automatically
Yes
No

- **Auto Add CC Users as CC Recipients** – if enabled, any additional incoming recipients for a ticket (different to the address used to create the ticket) will be added as CC users. For more information on third part recipients, see CC, BCC and third party recipients in the staff control

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panel.

- **Enable Two Way Email Processing** – if enabled, staff users replying from their staff user e-mail address can add ticket replies by replying to an e-mail directly (such as to a ticket alert).

Flood Protection

Flood Protection
Enable/Disable Flood Protection
Toggle the Status for Flood Protection. It is recommended that you never disable this option as it prevents mail loops that can happen if your client has an autoresponder message set.
Yes
No
Dont Send Autoresponder Message
If Enabled, No Autoresponder Message will be sent when the Flood Protection is triggered.
Yes
No
Dont add the Ticket/Reply
If Enabled, The Incoming Email will be simply ignored if Flood Protection is triggered. It is recommended that you do not enable this option as simply disabling the Autoresponder message should stop any potential mail loop.
Yes
No
Timing Threshold (In Seconds)
Threshold for checking for Potential Flood Protection cases.
How Flood Protection Works?
Whenever an incoming email is received, SupportSuite checks the Tickets table to see if the user created a ticket with the same subject in the given threshold time, If this check succeeds, Flood Protection gets triggered and the specified actions are carried out.
600

- **Enable/Disable Flood Protection** – if enabled, the flood protection system will prevent mail loops that can cause the number of incoming and outgoing e-mails to escalate rapidly. This may happen, for example, if your client has an auto-responder for their e-mail address set up; the client's auto-responder would in turn trigger the support desk auto-responder. It is **highly recommended** the flood protection system be enabled.

- **I Send Autoresponder Message** – if enabled and if the flood protection system is triggered, stop sending auto-responded reply receipts. It is **highly recommended** this setting be enabled so to prevent mail loops from occurring.

- **I add the Ticket/Reply** – if enabled, a message that causes the flood protection system to trigger will not be processed and not added to a ticket (or used to create a new ticket). This setting is not necessarily essential – enabling the *I Send Autoresponder Message* should suffice to prevent any mail loops from occurring.

- **Timing Threshold (In Seconds)** – when an incoming e-mail is received, the flood protection system checks the ticket table to see if the user created a ticket with the same subject within the given threshold time. If the user has, the flood protection system will trigger.

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Search Options

These settings affect the configuration of the indexing engine. All strings (except those that fall into exclusion rules, set below) are indexed into a words table. When searches are performed, it is this table that is searched.

The looser your exclusion rules are for the indexing engine (for example, a low minimum string length and a high maximum), the more words that will be added to the table. However, the more words there are in the table the slower and more server resource intensive searches will be.

If you are not having problems with the search results returned when performing searches or the performance of your server during searches, leave these settings to their defaults.

Search Options
Sort Results According to Last Activity (Descending)
If Enabled, All Search Results are sorted according to Last Activity in Descending Order, Otherwise the default view sort order is used.
Yes
No
Improved Ticket Relevance when Searching
If Enabled, The relevance is counted more efficiently and displayed along with the ticket. This setting slows down searches by 30-40%
Yes
No
Search Results Limit
Specify the maximum number of Search Results to be returned when a search is executed.
50
Minimum Word Length
Specify the Minimum Length of a Word for the Indexing Engine. Any Word that does not meet this criteria will be ignored by the system.
3
Maximum Word Length
Specify the Maximum Length of a Word for the Indexing Engine. Any Word which is bigger than the specified length will be ignored.
30
Index Numbers
Toggle the Indexing of Numbers
Yes
No
Minimum Number Length
Minimum Length for a Number to Qualify for Indexing
6
Word Fault Tolerance
Specify the Fault Tolerance for a Word. If the Word occurs in the Ticket for more than X Specified Times, It will be ignored and not added to the ticket.
10
Ignore Words with Symbols
If Enabled, Any word with a symbol in it will be ignored. This includes URLs, Phone Numbers (With - in them), Ticket IDs etc.
Yes
No

- **Sort Results According to Last Activity (Descending)** – if enabled, all search results will be sorted according to their **last activity** in **descending** Order. If disabled, default view sort order is used. See listing tickets in the staff control panel for more information on ticket sorting and filtering.

- **Improved Ticket Relevance when Searching** – if enabled, the accuracy of search returns will be increased by 30 – 40%.

- **Search Results Limit** – the maximum number of search results returned by the system when performing a search. The higher this limit, the slower and more server resource intensive

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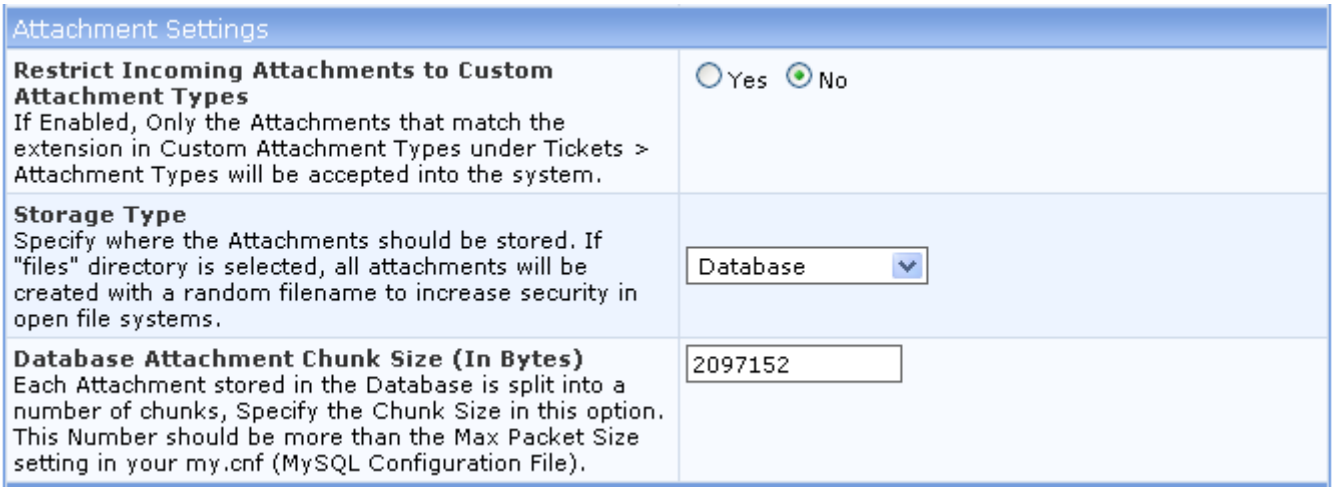
searches will be.

- **Minimum Word Length** – the minimum length that a string has to be indexed. Terms that are not indexed cannot be searched for. This setting is present because indexing **all** words and strings within ticket posts will rapidly increase the size of the database, slow down searches and make them more server resource intensive.
- **Maximum Word Length** – the maximum length that a string has to be before it is skipped by the indexing engine.
- **Index Numbers** – if enabled, numbers will be indexed by the indexing engine.
- **Minimum Number Length** – the minimum length a number has to be before it is indexed by the indexing engine.
- **Word Fault Tolerance** – if searching tickets for the word "test", and a ticket has **more occurrences of** this string, it will not be displayed in search.
- **Ignore Words with Symbols** – if enabled, strings that contain symbols will not be indexed. This includes e-mail addresses (user@hello.com) and URLs (www.hello.com).

Attachment Settings


Attachment Settings
Restrict Incoming Attachments to Custom Attachment Types
If Enabled, Only the Attachments that match the extension in Custom Attachment Types under Tickets > Attachment Types will be accepted into the system.
Yes
No
Storage Type
Specify where the Attachments should be stored. If "files" directory is selected, all attachments will be created with a random filename to increase security in open file systems.
Database
Database Attachment Chunk Size (In Bytes)
Each Attachment stored in the Database is split into a number of chunks, Specify the Chunk Size in this option. This Number should be more than the Max Packet Size setting in your my.cnf (MySQL Configuration File).
2097152

- **Restrict Incoming Attachments to Custom Attachment Types** – if enabled, only attachment types defined under attachment types will be processed, when attached to incoming tickets and replies.
- **Storage Type** – attachments can be stored either in the database or the file system. Storing attachments in the database may make your database size very large – increasing the load on your database server. Some server configurations also have problems handing the database file storage. If you do have problems downloading attachments from tickets, set the storage type to **"files" Directory**. Remember that when setting the storage type to the file system, you must ensure the "files" directory is writeable (CHMOD 777).
- **Database Attachment Chunk Size (In Bytes)** – each Attachment stored in the database is split up into a number of chunks. This number should not be any more than the Max Packet Size setting in your MySQL Configuration file.

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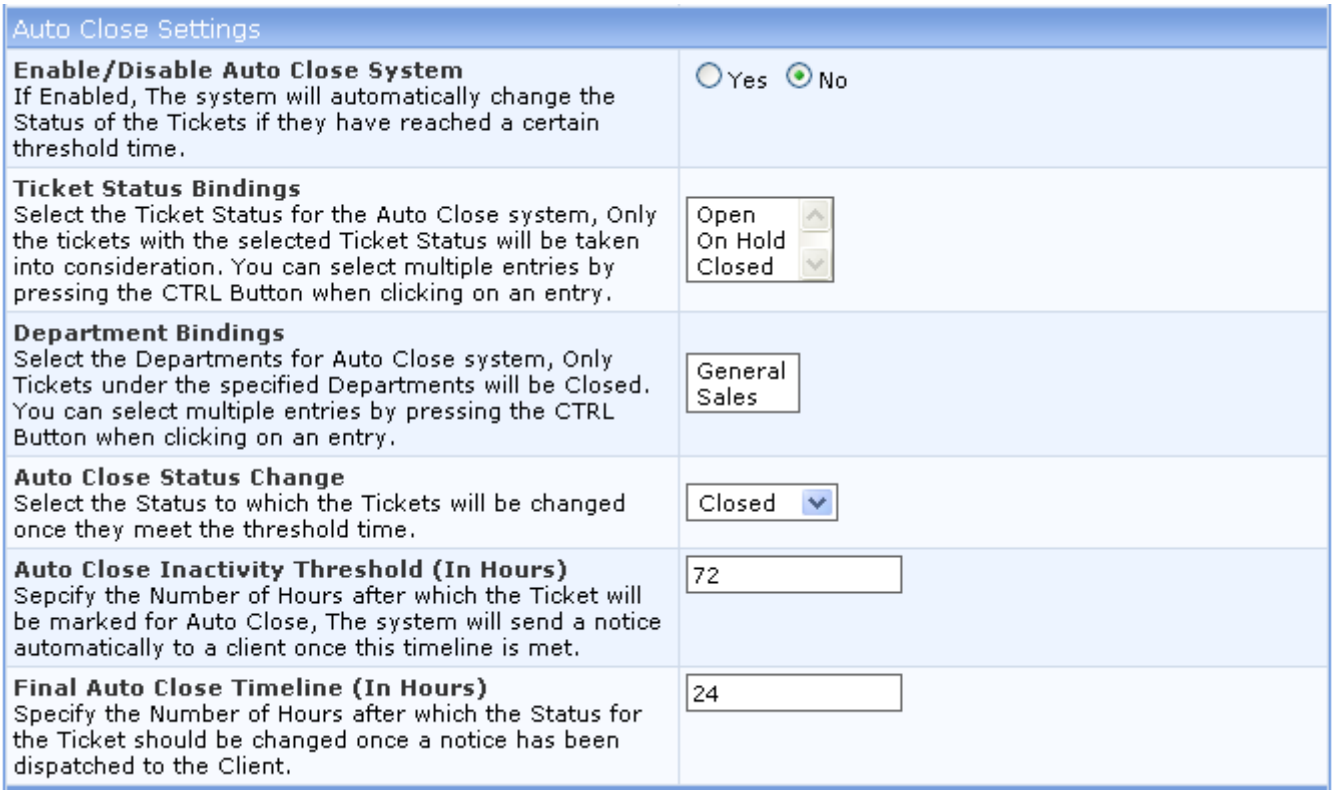
Auto Close Settings


Auto Close Settings
Enable/Disable Auto Close System
If Enabled, The system will automatically change the Status of the Tickets if they have reached a certain threshold time.
Yes
No
Ticket Status Bindings
Select the Ticket Status for the Auto Close system, Only the tickets with the selected Ticket Status will be taken into consideration. You can select multiple entries by pressing the CTRL Button when clicking on an entry.
Open
On Hold
Closed
Department Bindings
Select the Departments for Auto Close system, Only Tickets under the specified Departments will be Closed. You can select multiple entries by pressing the CTRL Button when clicking on an entry.
General
Sales
Auto Close Status Change
Select the Status to which the Tickets will be changed once they meet the threshold time.
Closed
Auto Close Inactivity Threshold (In Hours)
Sepcify the Number of Hours after which the Ticket will be marked for Auto Close, The system will send a notice automatically to a client once this timeline is met.
72
Final Auto Close Timeline (In Hours)
Specify the Number of Hours after which the Status for the Ticket should be changed once a notice has been dispatched to the Client.
24

The auto close system for tickets will automatically set a ticket's status to a specified status after a given amount of time. The auto close system can also be set to only automatically close tickets for certain departments and certain statuses.

- **Enable/Disable Auto Close System** – if enabled, the auto close system will be activated.
- **Ticket Status Bindings** – the ticket statuses selected here will be bound to the auto close system. The auto close system will only look to close tickets that are set to one of the statuses set here.
- **Auto Close Status Change** – the status tickets closed by the auto close system will be changed to.
- **Auto Close Inactivity Threshold (In Hours)** – the number of hours after which an inactivity notice will be sent to a ticket owner, warning them of the pending auto close.
- **Final Auto Close Timeline (In Hours)** – the number of hours after which tickets will be automatically closed by the auto close system **after** the inactivity notice has been set.

Ticket lock settings

The ticket locking system prevents more than one staff user from replying to a ticket at the same time. It does this on two levels – first by indicated the ticket is being "looked at" by a staff user, and secondly (if enabled) if two staff users begin replying to the ticket at the same time, each will receive a live preview of what the other is typing. To see how post-based ticket locking works, see ticket locking in the staff control panel.

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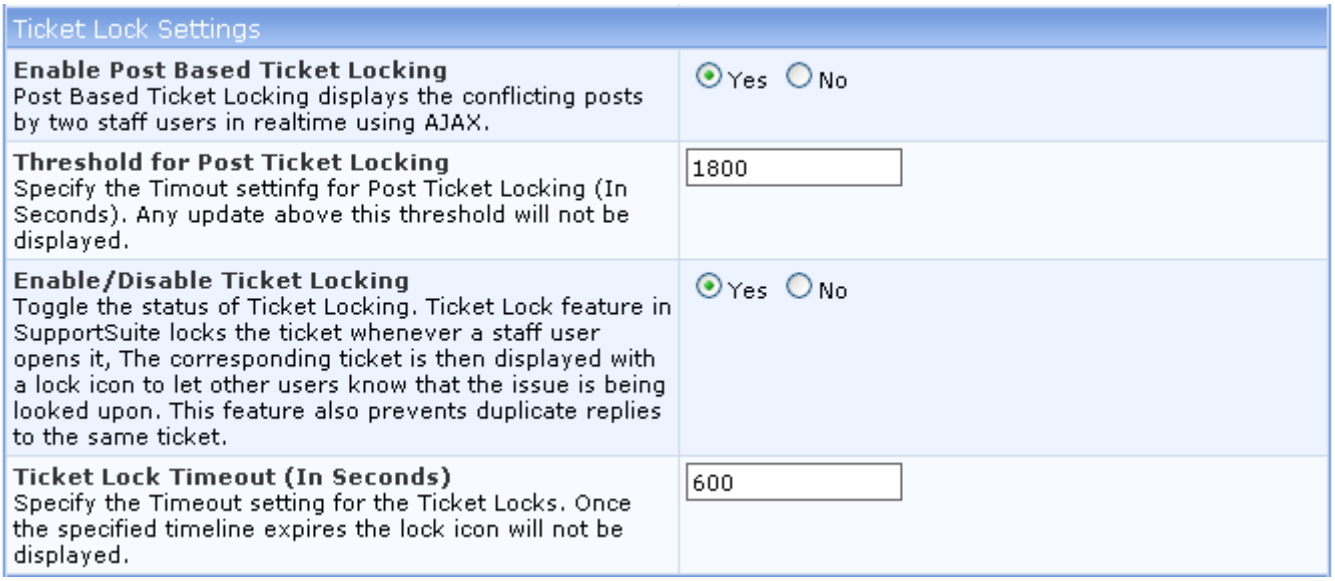
Ticket Lock Settings
Enable Post Based Ticket Locking
Post Based Ticket Locking displays the conflicting posts by two staff users in realtime using AJAX.
Yes
No
Threshold for Post Ticket Locking
Specify the Timout settinfg for Post Ticket Locking (In Seconds). Any update above this threshold will not be displayed.
1800
Enable/Disable Ticket Locking
Toggle the status of Ticket Locking. Ticket Lock feature in SupportSuite locks the ticket whenever a staff user opens it, The corresponding ticket is then displayed with a lock icon to let other users know that the issue is being looked upon. This feature also prevents duplicate replies to the same ticket.
Yes
No
Ticket Lock Timeout (In Seconds)
Specify the Timeout setting for the Ticket Locks. Once the specified timeline expires the lock icon will not be displayed.
600

- **Enable Post Based Ticket Locking** – the post-based ticket locking system displays, in real time, another staff's reply to a ticket if two staff users begin replying to a ticket at the same time.
- **Threshold for Post Ticket Locking** – any update made after this threshold will not be displayed.
- **Enable/Disable Ticket Locking** – if enabled, the ticket locking system will be activated.
- **Ticket Lock Timeout (In Seconds)** – once this time has expired, and the staff user viewing the ticket has not made an update (such as refreshing the page or replying), the lock icon will no longer be displayed for this ticket.

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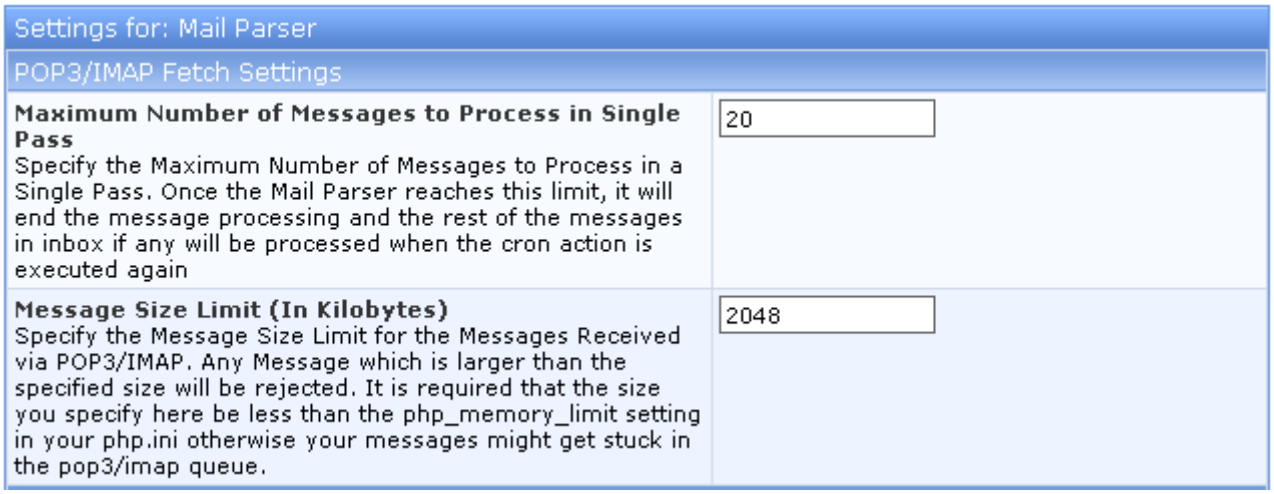
Mail parser

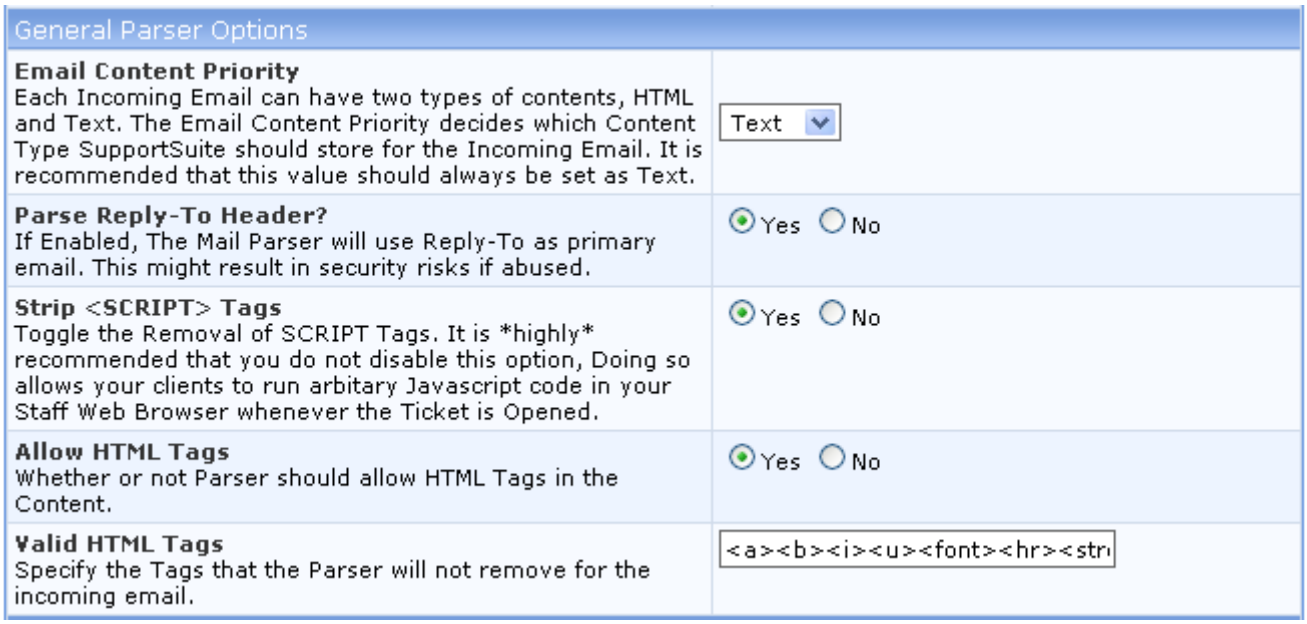
POP3/IMAP fetch settings


Settings for: Mail Parser
POP3/IMAP Fetch Settings
Maximum Number of Messages to Process in Single Pass
Specify the Maximum Number of Messages to Process in a Single Pass. Once the Mail Parser reaches this limit, it will end the message processing and the rest of the messages in inbox if any will be processed when the cron action is executed again
20
Message Size Limit (In Kilobytes)
Specify the Message Size Limit for the Messages Received via POP3/IMAP. Any Message which is larger than the specified size will be rejected. It is required that the size you specify here be less than the php_memory_limit setting in your php.ini otherwise your messages might get stuck in the pop3/imap queue.
2048

- **Maximum Number of Messages to Process in Single Pass** – the mail parser fetches and parses incoming e-mails in batches. The **task** is run every 10 minutes (see scheduled tasks). If this number is increases, ensure that the timeout time in your PHP configuration is set fairly high.
- **Message Size Limit (In Kilobytes)** – any message that is larger than the size set here will be rejected. The size you specify here **must be smaller** than the value for the PHP setting *php_memory_limit*.

Please note that automatic POP3 and IMAP fetching is disabled by default. For more information, see scheduled tasks.

General parser options


General Parser Options
Email Content Priority
Each Incoming Email can have two types of contents, HTML and Text. The Email Content Priority decides which Content Type SupportSuite should store for the Incoming Email. It is recommended that this value should always be set as Text.
Text
Parse Reply-To Header?
If Enabled, The Mail Parser will use Reply-To as primary email. This might result in security risks if abused.
Yes
No
Strip <SCRIPT> Tags
Toggle the Removal of SCRIPT Tags. It is *highly* recommended that you do not disable this option, Doing so allows your clients to run arbitary Javascript code in your Staff Web Browser whenever the Ticket is Opened.
Yes
No
Allow HTML Tags
Whether or not Parser should allow HTML Tags in the Content.
Yes
No
Valid HTML Tags
Specify the Tags that the Parser will not remove for the incoming email.
<a><b><i><u><font><hr><str

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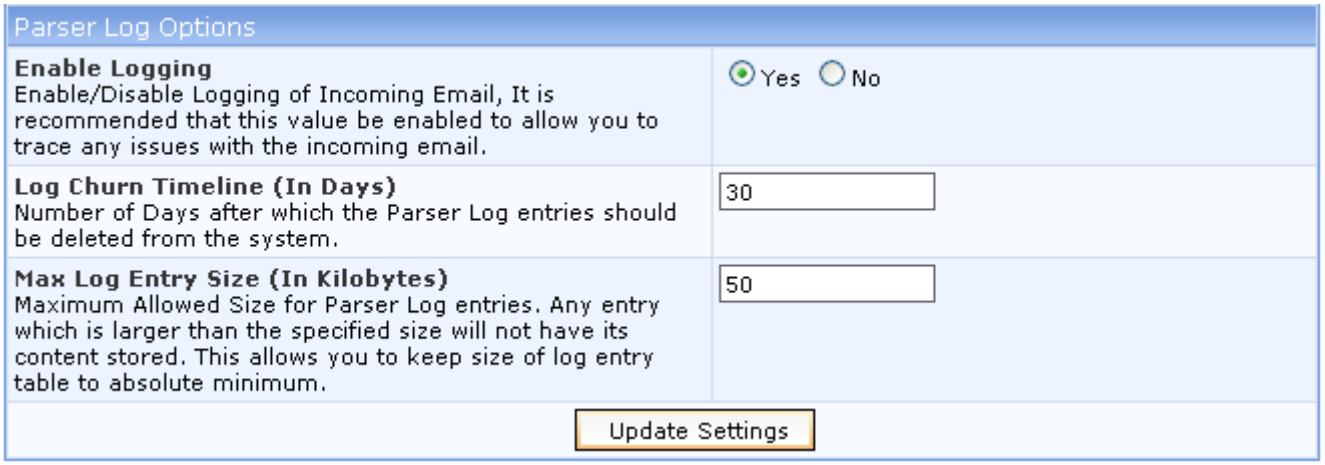
- **Email Content Priority** – which type of e-mail content the system should use for parsing and storing (normally, an e-mail comes in two parts; a plain text and a HTML-based version). It is recommend this be left to **Text** to be efficient on space and processing time.
- **Parse Reply-To Header?** – if enabled, the mail parser will use the address in the rely-to field as it's primary e-mail for a ticket. Although unlikely, enabling this option may open ticket ownership features to abuse.
- **Strip <SCRIPT> Tags** – if enabled, all <script> tags will be stripped from incoming messages. Enabling this settings comes **highly recommended**, otherwise you may risk having arbitrary JavaScript code being run in the staff user's web browser.
- **Allow HTML Tags** – should the parser allow any HTML tags in an e-mail's content?
- **Valid HTML Tags** – the list of valid HTML tags that are allowed in an e-mail's content (dependant on the **Allow HTML Tags** setting).

Parser log options


Parser Log Options
Enable Logging
Enable/Disable Logging of Incoming Email, It is recommended that this value be enabled to allow you to trace any issues with the incoming email.
Yes
No
Log Churn Timeline (In Days)
Number of Days after which the Parser Log entries should be deleted from the system.
30
Max Log Entry Size (In Kilobytes)
Maximum Allowed Size for Parser Log entries. Any entry which is larger than the specified size will not have its content stored. This allows you to keep size of log entry table to absolute minimum.
50
Update Settings

- **Enable Logging** – if enabled, a log will be kept of all e-mail coming into the system and how the parser handled the incoming e-mail. Raw copies of e-mails are also stored in the parser log. To view the parser log, see parser log.
- **Log Churn Time (In Days)** – the number of days after which the logs will be purged from the system.
- **Max Log Entry size (In Kilobytes)** – the maximum allowed size for a parser log entry. Any e-mail who's content makes up a size larger than this value will not be stored in the parser log.

Click on the **Update Settings** button to save the setting changes.

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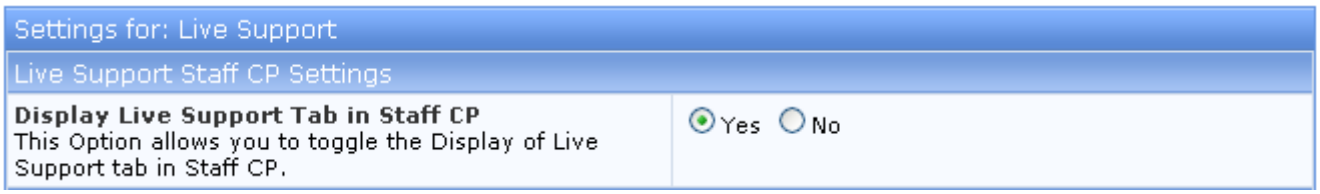
Live support

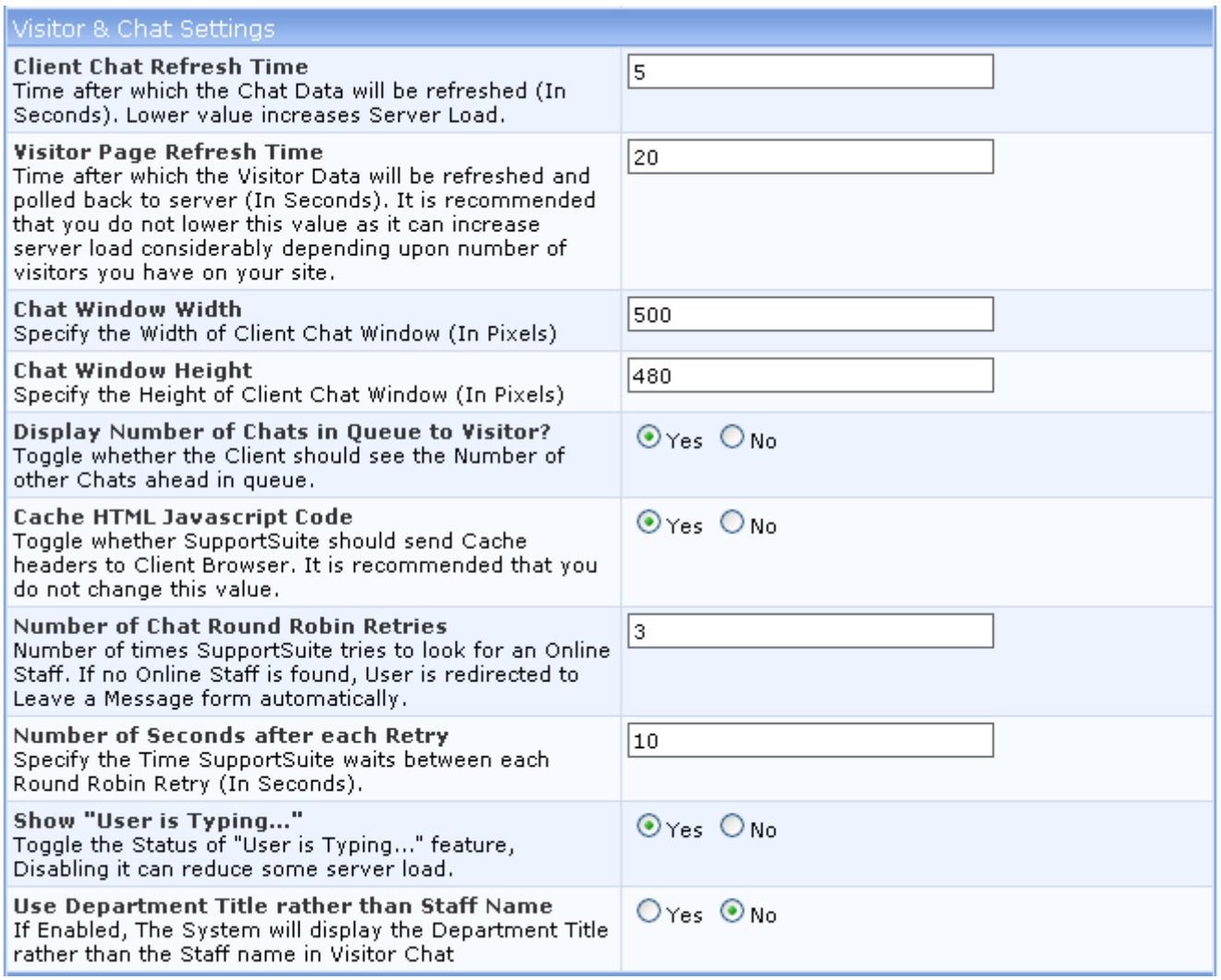
For more information on the live support integration, see live support in the staff control panel.

Staff CP


Settings for: Live Support
Live Support Staff CP Settings
Display Live Support Tab in Staff CP
This Option allows you to toggle the Display of Live Support tab in Staff CP.
Yes
No

- **Display Live Support Tab in Staff CP** – if enabled, the live support tab will be displayed and accessible within the staff control panel (see navigation menu bar in the staff control panel).

Visitor and chat


Visitor & Chat Settings
Client Chat Refresh Time
Time after which the Chat Data will be refreshed (In Seconds). Lower value increases Server Load.
5
Visitor Page Refresh Time
Time after which the Visitor Data will be refreshed and polled back to server (In Seconds). It is recommended that you do not lower this value as it can increase server load considerably depending upon number of visitors you have on your site.
20
Chat Window Width
Specify the Width of Client Chat Window (In Pixels)
500
Chat Window Height
Specify the Height of Client Chat Window (In Pixels)
480
Display Number of Chats in Queue to Visitor?
Toggle whether the Client should see the Number of other Chats ahead in queue.
Yes
No
Cache HTML Javascript Code
Toggle whether SupportSuite should send Cache headers to Client Browser. It is recommended that you do not change this value.
Yes
No
Number of Chat Round Robin Retries
Number of times SupportSuite tries to look for an Online Staff. If no Online Staff is found, User is redirected to Leave a Message form automatically.
3
Number of Seconds after each Retry
Specify the Time SupportSuite waits between each Round Robin Retry (In Seconds).
10
Show "User is Typing..."
Toggle the Status of "User is Typing..." feature, Disabling it can reduce some server load.
Yes
No
Use Department Title rather than Staff Name
If Enabled, The System will display the Department Title rather than the Staff name in Visitor Chat
Yes
No

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- **Client Chat Refresh Time** – the value here measures (in seconds) how often the client's chat frame (browser-based) will refresh. A number closer to 1 will considerably increase the server load.
- **Visitor Page Refresh Time** – the value here measures (in seconds) the time between each visitor data refresh, when being tracked using the LiveResponse Client Application.
- **Chat Window Width** – the width of the client's chat window.
- **Chat Window Height** – the height of the client's chat window.
- **Display Number of Chats in Queue to Visitor? –** if enabled and if the visitor is placed in a chat queue, he or she will be told how many chats are in the queue preceding them.
- **Cache HTML JavaScript Code** – enabling this setting will cause the JavaScript code used to generate live support status icons (see live support status button (for a website) in the staff control panel) etc. to be cached. Caching the JavaScript reduces the load on a busy support desk.
- **Number of Chat Round Robin Retries** – when a chat request comes into the LiveResponse Client Application, the system will notify each available staff user in turn as to the new chat request. If the staff user does not accept the chat within the time set in the **Number of Seconds after each Retry**, the system will try the next staff user.
- **Number of Seconds after each Retry** – the number of seconds that each staff user is "tried" for (related to the *Number of Chat Round Robin Retries* setting, above).
- **Show "User is Typing**…" – if enabled, you will not receive an indication as to whether or not the user is typing text, nor will the user receive an indication that you (the staff user) is typing text.
- **Use Department Title rather than Staff Name** – if enabled, the name of the staff user chatter will be taken from the live support department's name rather than the staff user's actual name (see staff user preferences for a staff user's real name, in the staff control panel).

Offline messages

Offline Messages Settings
Enable Message Forwarding
Toggle whether SupportSuite should forward the Messages received to another Email. You can use this feature to forward message to third party email systems.
Yes
No
Message Forward Email
If Set, Any New messages received will be forwarded to the specified email with their FROM Email set to the users email.
Delete Message after Forwarding?
If Enabled, The Message will be deleted automatically after being forwarded.
Yes
No

- **Enable Message Forwarding** – if enabled, offline messages sent to the system (for example, if live support is not available or after a chat session has ended), can be forwarded to an external e-mail address (set in the **Message Forward Email** setting).

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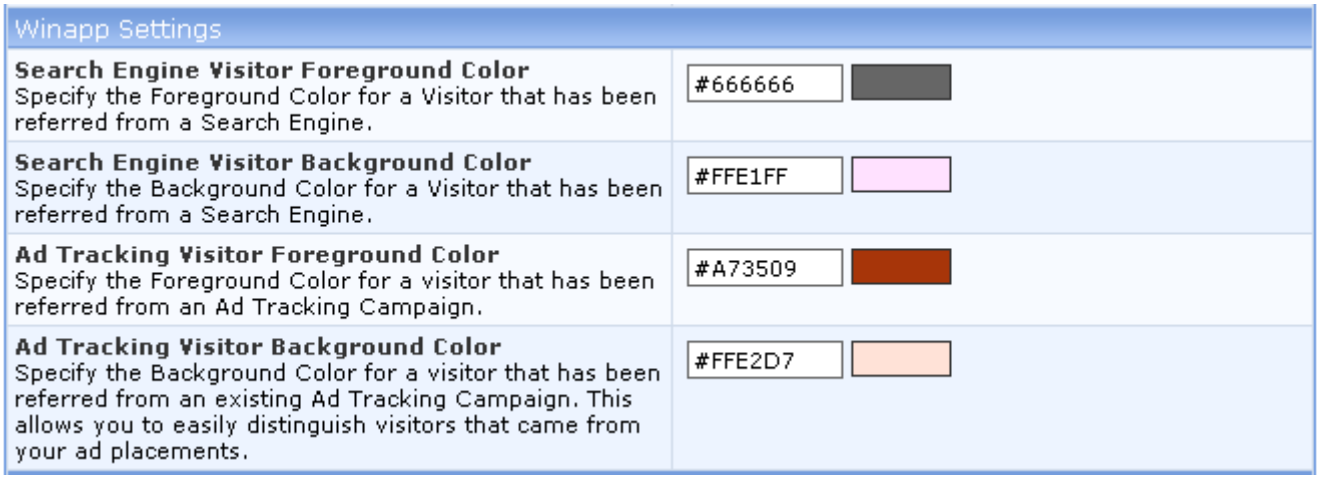
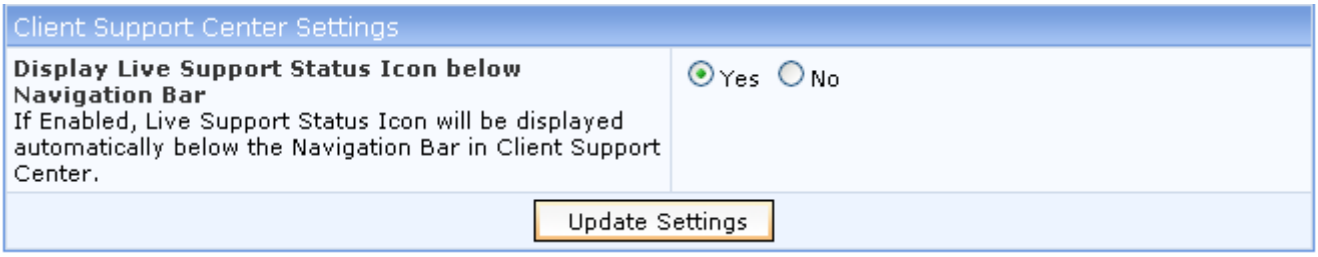
- **Message Forward Email** – the e-mail to which offline messages are forwarded (dependant on the *Enable Message Forward* setting).
- **Delete Message after Forwarding** – if enabled, the offline message will be deleted from the offline message's databases in the staff control panel. For more, see offline messages in the staff control panel).

Client application


Winapp Settings
Search Engine Visitor Foreground Color
Specify the Foreground Color for a Visitor that has been referred from a Search Engine.
#666666
Search Engine Visitor Background Color
Specify the Background Color for a Visitor that has been referred from a Search Engine.
#FFE1FF
Ad Tracking Visitor Foreground Color
Specify the Foreground Color for a visitor that has been referred from an Ad Tracking Campaign.
#A73509
Ad Tracking Visitor Background Color
Specify the Background Color for a visitor that has been referred from an existing Ad Tracking Campaign. This allows you to easily distinguish visitors that came from your ad placements.
#FFE2D7

The foreground colors for the rows used by the LiveResponse Client Application are configured here.

Client support center


Client Support Center Settings
Display Live Support Status Icon below Navigation Bar
If Enabled, Live Support Status Icon will be displayed automatically below the Navigation Bar in Client Support Center.
Yes
No
Update Settings

- **Display Live Support Status Icon below Navigation Bar** – if enabled, the live support status icon will be available on the client support interface, as shown below.

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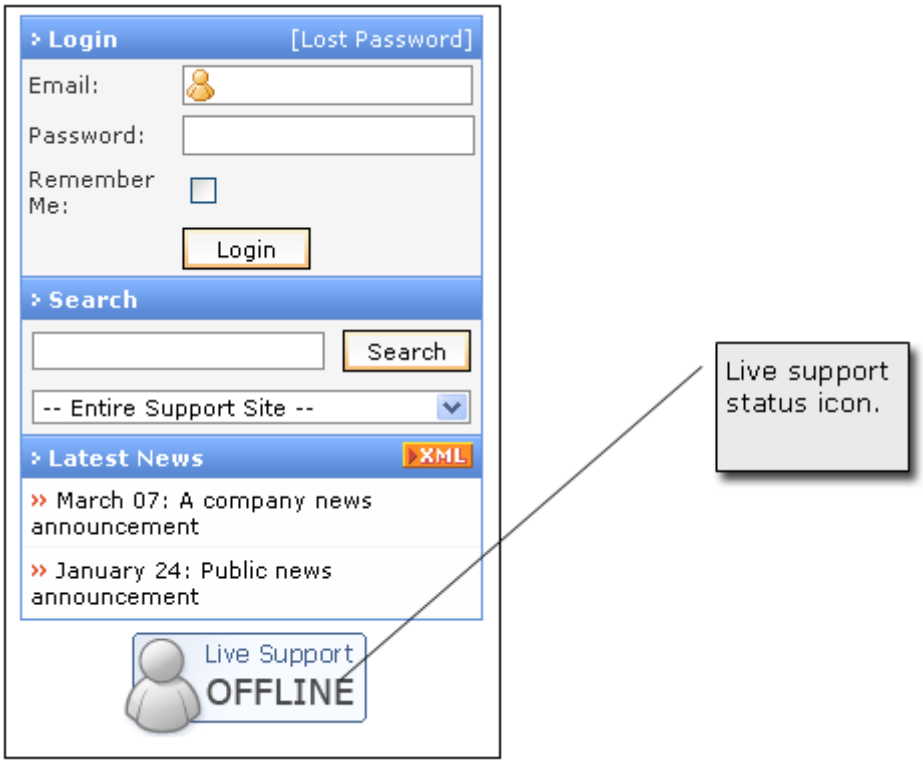

Click on the **Update Settings** button to save the setting changes.

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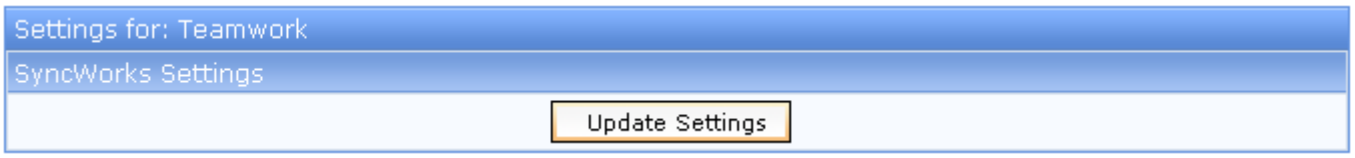
Teamwork

For more information on using the teamwork module, see teamwork in the staff control panel.



Don't worry – your installation is working well. There are no settings configurable in this area of the administrator control panel. To configure Teamwork module properties, see the teamwork area of the administrator control panel.

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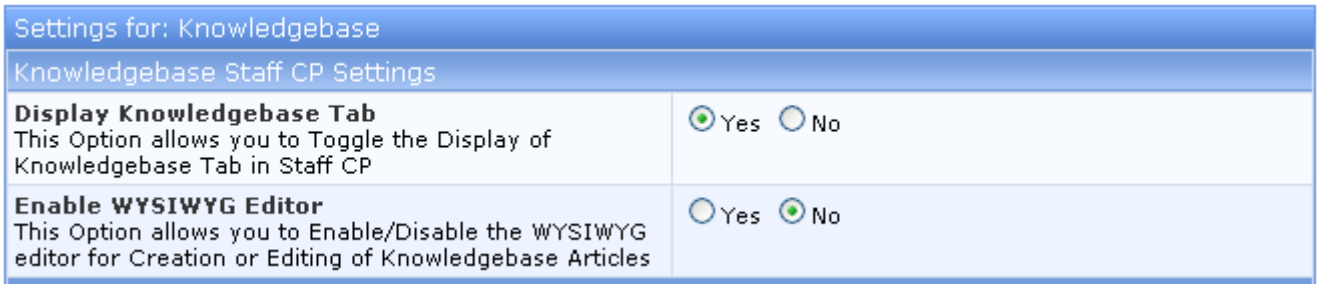
Knowledgebase

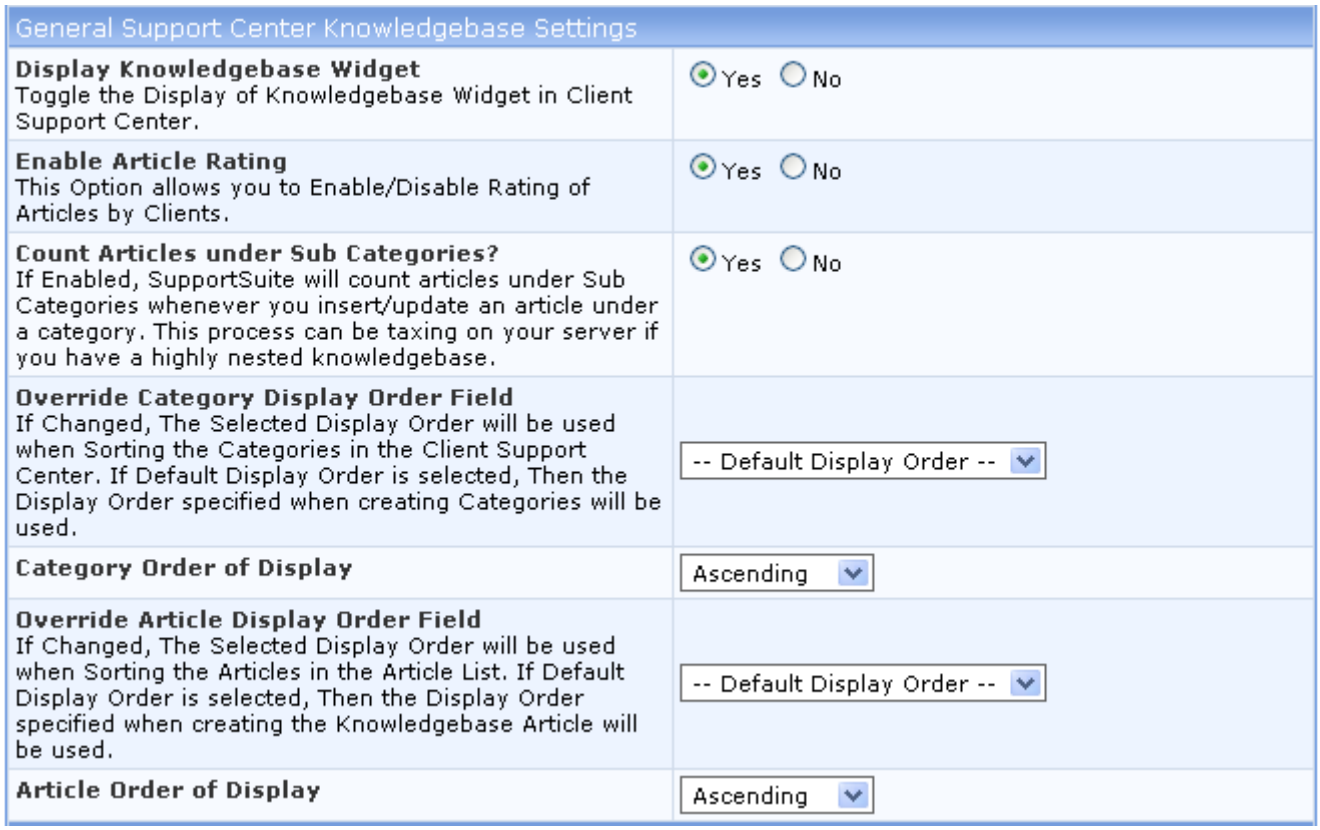
For more information on managing the content of the knowledgebase, see knowledgebase in the staff control panel.

Staff CP


Settings for: Knowledgebase
Knowledgebase Staff CP Settings
Display Knowledgebase Tab
This Option allows you to Toggle the Display of Knowledgebase Tab in Staff CP
Yes
No
Enable WYSIWYG Editor
This Option allows you to Enable/Disable the WYSIWYG editor for Creation or Editing of Knowledgebase Articles
Yes
No

- **Display Knowledgebase Tab** – if enabled, the knowledgebase tab will be displayed and accessible within the staff control panel (see navigation menu bar in the staff control panel).
- **Enable WYSIWYG Editor** – if enabled, the what-you-see-is-what-you-get editor will be enabled for creating and editing knowledgebase articles.

General support center


General Support Center Knowledgebase Settings
Display Knowledgebase Widget
Toggle the Display of Knowledgebase Widget in Client Support Center.
Yes
No
Enable Article Rating
This Option allows you to Enable/Disable Rating of Articles by Clients.
Yes
No
Count Articles under Sub Categories?
If Enabled, SupportSuite will count articles under Sub Categories whenever you insert/update an article under a category. This process can be taxing on your server if you have a highly nested knowledgebase.
Yes
No
Override Category Display Order Field
If Changed, The Selected Display Order will be used when Sorting the Categories in the Client Support Center. If Default Display Order is selected, Then the Display Order specified when creating Categories will be used.
-- Default Display Order --
Category Order of Display
Ascending
Override Article Display Order Field
If Changed, The Selected Display Order will be used when Sorting the Articles in the Article List. If Default Display Order is selected, Then the Display Order specified when creating the Knowledgebase Article will be used.
-- Default Display Order --
Article Order of Display
Ascending

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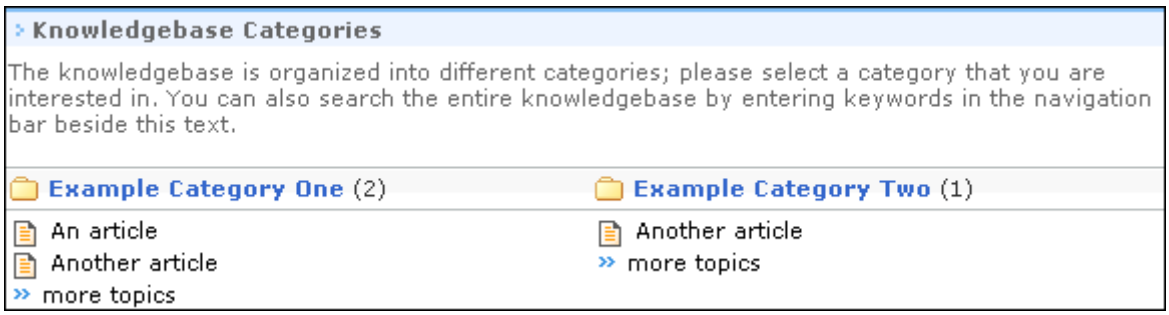
- **Display Knowledgebase Widget** – if enabled, the knowledgebase widget will be displayed in the client support interface (see what is a widget, in the frequently asked questions).
- **Enable Article Rating** – if enabled, any user (registered or not) will be able to rate articles out of 5.
- **Count Articles under Sub Categories** – if enabled, the system will "count" the number of articles in a category including all articles contained in sub-categories. The count is displayed on the client support interface. If disabled, only articles in the **immediate** category being viewed will be counted. This is a relatively minor setting, but can have a substantial impact on server resource load if your knowledgebase is very large and involves many nested categories.
- **Override Category Display Order Field** – if set, the selected field will be used to order the knowledgebase categories. If left as default, the **display order** set for each knowledgebase category will be used to order the categories (see knowledgebase in staff control panel).
- **Article Order of Display** – whether the articles are sorted ascending or descending.

Support center category index

Support Center Category Index Settings
Maximum Number of Articles to Display under Category List
2
Display More Topics link under Category List
Yes
No
Display Article Details under Category List
Yes
No
Character Limit for Article Content
Maximum Amount of Characters that are displayed under an Article in Category Index. Set this to '0' if you do not wish to display the Article Preview.
255

- **Maximum Number of Articles to Display under Category List** – when viewing the knowledgebase categories, this number of articles will be shown below each (as shown below).


Knowledgebase Categories
The knowledgebase is organized into different categories; please select a category that you are interested in. You can also search the entire knowledgebase by entering keywords in the navigation bar beside this text.
Example Category One (2)
An article
Another article
more topics
Example Category Two (1)
Another article
more topics

- **Display More Topics link under Category List** – if enabled, the "more topics" link (as shown above) will be displayed at the end of the article lists.
- **Display Article Details under Category List** – if enabled, when viewing a category a preview of each article will be shown below each article entry.
- **Character Limit for Article Content** – the maximum number of characters that are displayed as a preview text for the article, when viewing a category and all articles under it.

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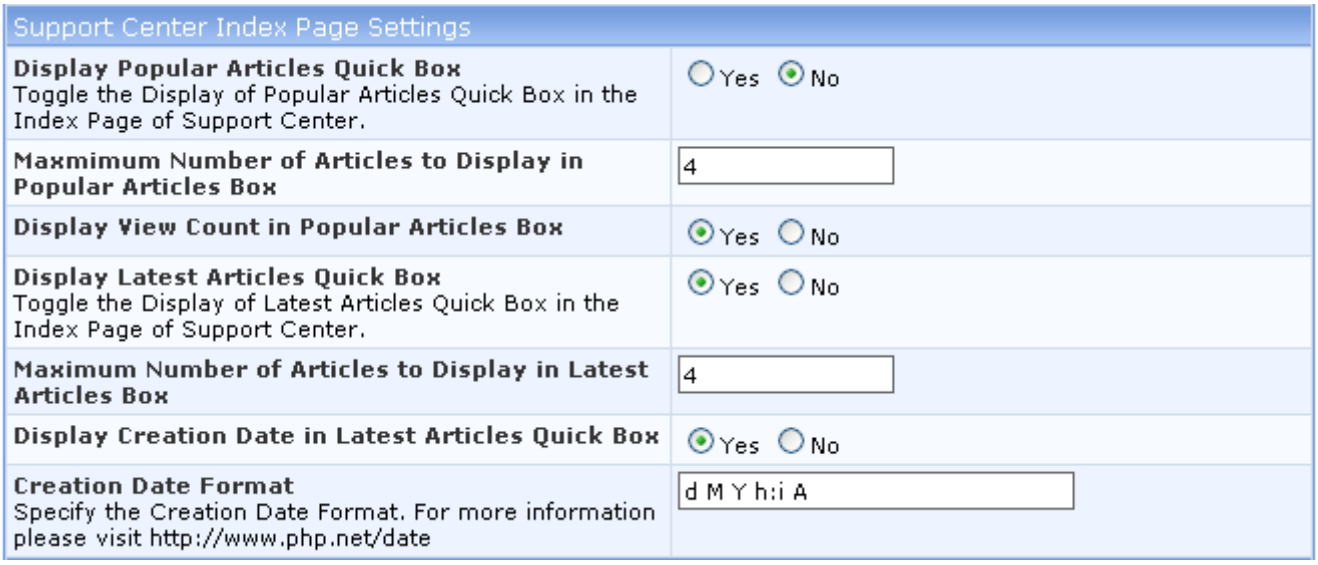
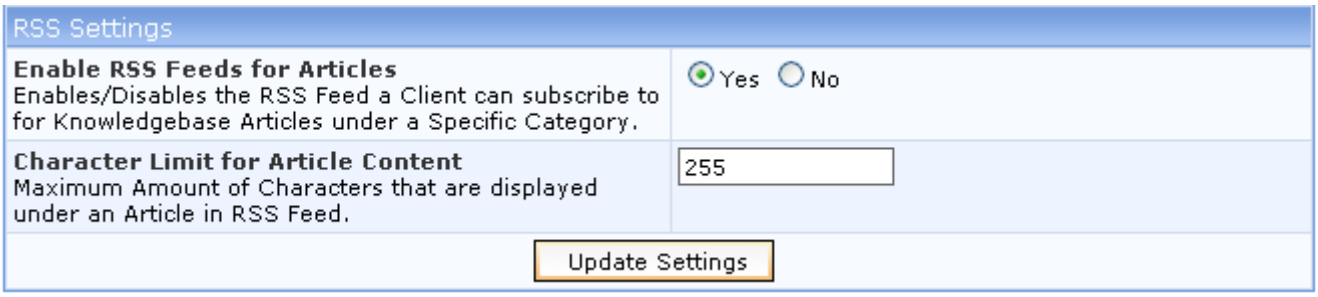
Support center index


Support Center Index Page Settings
Display Popular Articles Quick Box
Toggle the Display of Popular Articles Quick Box in the Index Page of Support Center.
Yes
No
Maxmimum Number of Articles to Display in Popular Articles Box
4
Display View Count in Popular Articles Box
Yes
No
Display Latest Articles Quick Box
Toggle the Display of Latest Articles Quick Box in the Index Page of Support Center.
Yes
No
Maximum Number of Articles to Display in Latest Articles Box
4
Display Creation Date in Latest Articles Quick Box
Yes
No
Creation Date Format
Specify the Creation Date Format. For more information please visit http://www.php.net/date
d M Y h:i A

- **Display Popular Articles Quick Box** – if enabled, the popular articles box will be displayed on the front page of the client support interface.
- **Maximum Number of Articles to Display in Popular Articles** Box – dependant on the *Display Popular Articles Quick Box* setting, the number of most popular articles to display.
- **Display View Count in Popular Articles Box** – if enabled, the view count for each popular article will be displayed.
- **Display Latest Articles Quick Box** – if enabled, the newest (latest) articles will be listed on the front page of the client support interface.
- **Maximum Number of Articles to Display in Latest Articles Box** – dependant on the *Display Latest Articles Quick Box* setting, the number of latest articles to display.
- **Display Creation Date in Latest Articles Quick Box** – if enabled, the creation date of each article in the newest article box will be listed.
- **Creation Date Format** – specify the format of the article creation dates. This value should accord to the PHP date() function, documented at www.php.net/date.

RSS interface


RSS Settings
Enable RSS Feeds for Articles
Enables/Disables the RSS Feed a Client can subscribe to for Knowledgebase Articles under a Specific Category.
Yes
No
Character Limit for Article Content
Maximum Amount of Characters that are displayed under an Article in RSS Feed.
255
Update Settings

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- **Enable RSS Feeds for Articles** – if enabled, RSS feeds for knowledgebase article categories will be made available via the client support interface. See what is an RSS feed, in the frequently asked questions.

- **Character Limit for Article Content** – the maximum number of preview characters for each article, for each RSS feed listing.

Click on the **Update Settings** button to save the setting changes.

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Troubleshooter

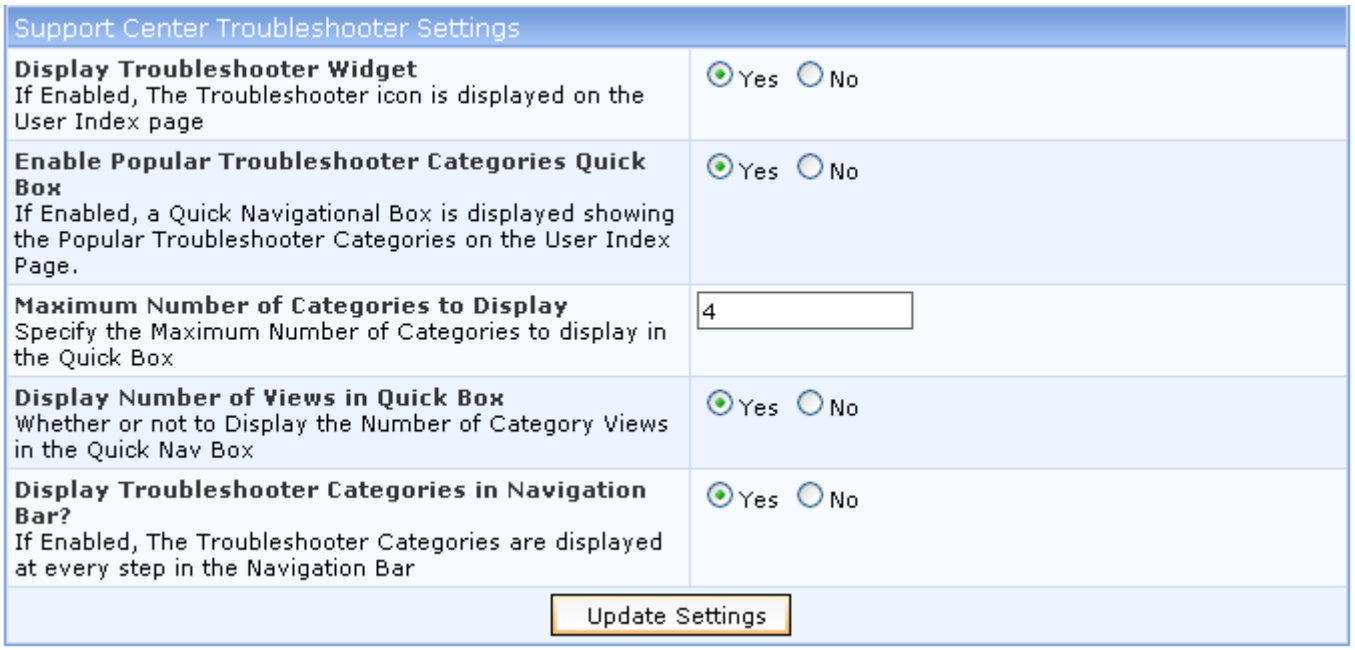
For more information on managing troubleshooter content, see troubleshooter in the staff control panel.

Staff CP

Settings for: Troubleshooter
Troubleshooter Staff CP Settings
Display Troubleshooter Tab
This Option allows you to Toggle the Display of Troubleshooter Tab in Staff CP.
Yes
No
Enable WYSIWYG Editor
If Enabled, WYSIWYG Editor is Used for the Category and Step Contents in the Staff CP
Yes
No

- **Display Troubleshooter Tab** – if enabled, the troubleshooter tab will be displayed and accessible within the staff control panel (see navigation menu bar in the staff control panel).
- **Enable WYSIWYG Editor** – if enabled, the what-you-see-is-what-you-get editor will be enabled for creating and editing troubleshooter entries.

Support center


Support Center Troubleshooter Settings
Display Troubleshooter Widget
If Enabled, The Troubleshooter icon is displayed on the User Index page
Yes
No
Enable Popular Troubleshooter Categories Quick Box
If Enabled, a Quick Navigational Box is displayed showing the Popular Troubleshooter Categories on the User Index Page.
Yes
No
Maximum Number of Categories to Display
Specify the Maximum Number of Categories to display in the Quick Box
4
Display Number of Views in Quick Box
Whether or not to Display the Number of Category Views in the Quick Nav Box
Yes
No
Display Troubleshooter Categories in Navigation Bar?
If Enabled, The Troubleshooter Categories are displayed at every step in the Navigation Bar
Yes
No
Update Settings

- **Display Troubleshooter Widget** – if enabled, the knowledgebase widget will be displayed in the client support interface (see what is a widget, in the frequently asked questions).
- **Enable Popular Troubleshooter Categories Quick Box** – if enabled, popular troubleshooter categories will be displayed on the front page of the client support interface.

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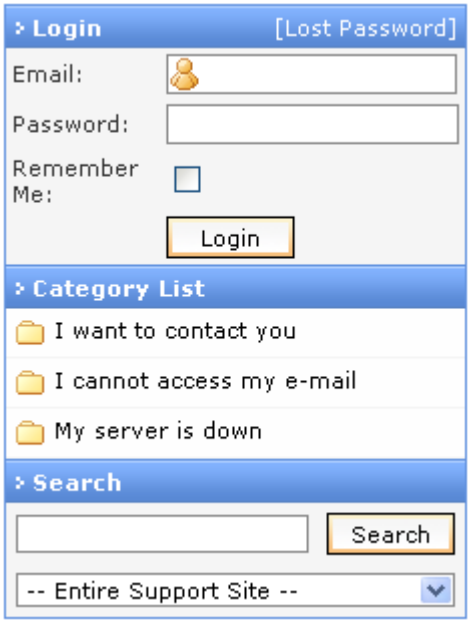
- **Maximum Number of Categories to Display** – the maximum number of troubleshooters to display (dependant on the *Enable Popular Troubleshooter Categories Quick Box* setting).
- **Display Number of Views in Quick Box** – if enabled, the number of views each troubleshooter has received will be displayed (dependant on the *Enable Popular Troubleshooter Categories Quick Box* setting).
- **Display Troubleshooter Categories in Navigation Bar**? – if enabled, when viewing a particular troubleshooter the user will see a list the list of popular troubleshooter categories on the navigation bar, as shown below.



Click on the **Update Settings** button to save the setting changes.

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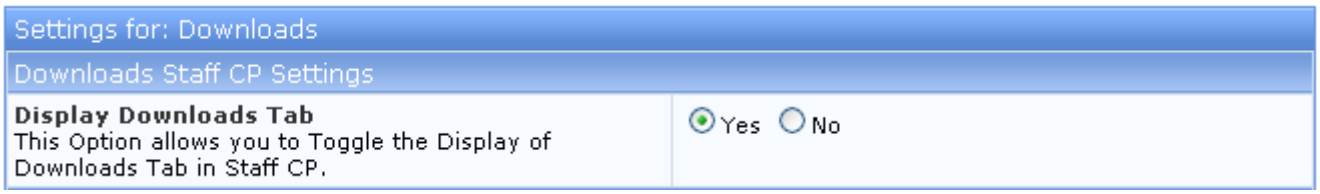
Downloads

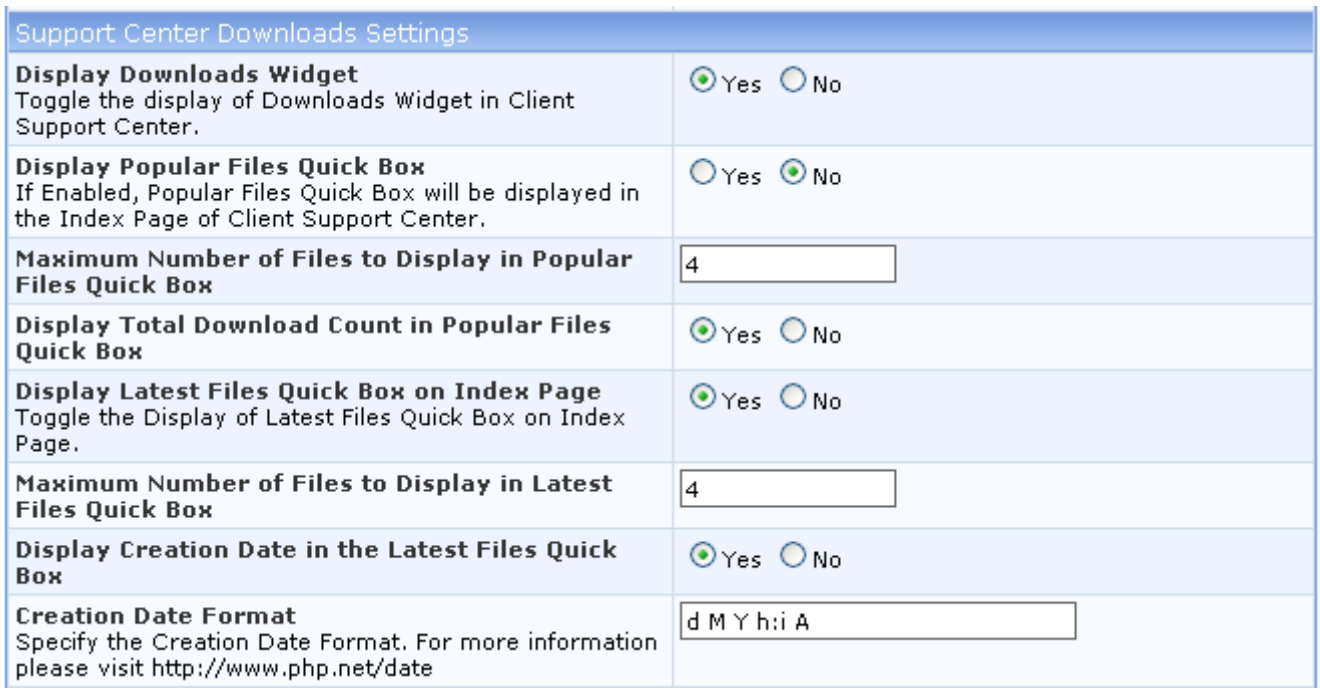
For more information on managing file downloads, see downloads in the staff control panel.

Staff CP


Settings for: Downloads
Downloads Staff CP Settings
Display Downloads Tab
This Option allows you to Toggle the Display of Downloads Tab in Staff CP.
Yes
No

- **Display Downloads Tab** – if enabled, the downloads tab will be displayed and accessible within the staff control panel (see navigation menu bar in the staff control panel).

Support center


Support Center Downloads Settings
Display Downloads Widget
Toggle the display of Downloads Widget in Client Support Center.
Yes
No
Display Popular Files Quick Box
If Enabled, Popular Files Quick Box will be displayed in the Index Page of Client Support Center.
Yes
No
Maximum Number of Files to Display in Popular Files Quick Box
4
Display Total Download Count in Popular Files Quick Box
Yes
No
Display Latest Files Quick Box on Index Page
Toggle the Display of Latest Files Quick Box on Index Page.
Yes
No
Maximum Number of Files to Display in Latest Files Quick Box
4
Display Creation Date in the Latest Files Quick Box
Yes
No
Creation Date Format
Specify the Creation Date Format. For more information please visit http://www.php.net/date
d M Y h:i A

- **Display Downloads Widget** – if enabled, the knowledgebase widget will be displayed in the client support interface (see what is a widget, in the frequently asked questions).
- **Display Popular Files Quick Box** – if enabled, popular files categories will be displayed on the front page of the client support interface.
- **Maximum Number of Files to Display in Popular Files Quick Box** – the maximum number of files to display (dependant on the *Display Popular Files Quick Box* setting).
- **Display Total Download Count in Popular Files Quick Box** – if enabled, the number of downloads each file has received will be displayed (dependant on the *Display Popular Files*

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Quick Box setting).

- **Display Popular Files Quick Box** – if enabled, the popular files box will be displayed on the front page of the client support interface.
- **Maximum Number of Files to Display in Popular Articles** Box – dependant on the *Display Popular Files Quick Box* setting, the number of most popular files to display.
- **Display Creation Date in the Latest Files Quick Box** – if enabled, the creation date of each file will be displayed in the popular files quick box (dependant on the *Display Popular Files Quick Box* setting).
- **Creation Date Format** – specify the format of the creation of each popular file. This value should accord to the PHP date() function, documented at www.php.net/date.

Support center category index

Support Center Category Index Settings
Override Category Display Order Field
If Changed, The Selected Display Order will be used when Sorting the Categories in the Client Support Center. If Default Display Order is selected, Then the Display Order specified when creating Categories will be used.
-- Default Display Order --
Category Order of Display
Select the Default Order of Display for the Categories.
Ascending
Override Download Items Display Order Field
If Changed, The Selected Display Order will be used when Sorting the Download Items in the Client Support Center. If Default Display Order is selected, Then the Display Order specified when creating Download Items will be used.
-- Default Display Order --
Download Items Order of Display
Specify the Default Order of Display (Ascending or Descending) for the Download Item List
Ascending
Item Limit under Sub Categories
Specify the Maximum Number of Items to Display under the Sub Categories in the Download Category Index page.
2
Display More Items Link
Toggle the Display of More Items link under Sub Category list.
Yes
No
Display Item Description in List
If Enabled, A Brief Item description will be displayed in the Download Item list.
Yes
No
Character Limit for Item Description
Specify the Maximum Number of Characters to Display for the Download Item Description.
500

- **Override Category Display Order Field** – if set, the download categories will be sorted according to this setting. If left as default, the categories will be sorted according to their display order (see downloads in the staff control panel).
- **Category Order of Display** – whether the categories should be sorted ascending or descending.

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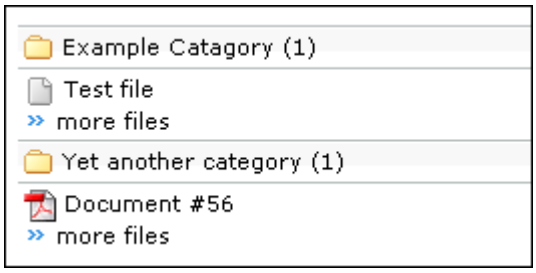
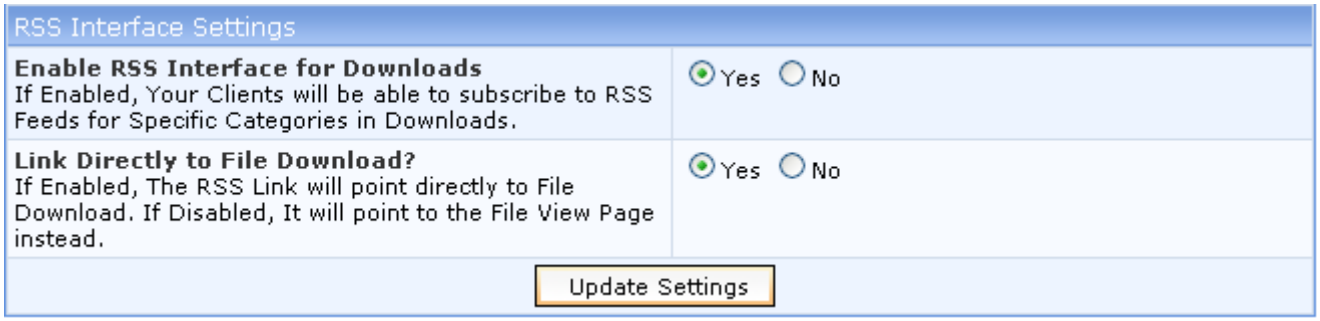
- **Override Download Items Display Order Field** – if set, the files will be sorted according to this setting. If left as default, the files will be sorted according to their display order (see downloads in the staff control panel).
- **Download Items Order of Display** – whether the files should be sorted ascending or descending.
- **Item Limit under Sub Categories** – the number of files listed under each sub-category (as a preview) when viewing download categories, as shown below.



- **Display More Items Link** – if enabled, the "more files" link will be shown under each sub-category (as shown above).
- **Display Item Description in List** – if enabled, a file's description preview will be shown when viewing a download category.
- **Character Limit for Item Description** – the maximum number of characters that will be shown as a preview of a file's description (dependant on the *Display Item Description in List* setting).

RSS interface


RSS Interface Settings
Enable RSS Interface for Downloads
If Enabled, Your Clients will be able to subscribe to RSS Feeds for Specific Categories in Downloads.
Yes
No
Link Directly to File Download?
If Enabled, The RSS Link will point directly to File Download. If Disabled, It will point to the File View Page instead.
Yes
No
Update Settings

- **Enable RSS Feeds for Downloads** – if enabled, RSS feeds of file download categories will be made available via the client support interface. See what is an RSS feed, in the frequently asked questions.
- **Link Directly to File Download**? – if enabled, the link to the file in the RSS feed will link directly the file. If disabled, the link will take a user to the file view page within the client support interface.

Click on the **Update Settings** button to save the setting changes.

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News

For more information on managing news articles, see news in the staff control panel.

General

Settings for: News
General News Settings
Display News Tab
This Option allows you to toggle the Display of News Tab in Staff CP.
Yes
No
Enable WYSIWYG Editor
This Option Enables/Disables the WYSIWYG (What You See is What You Get) HTML Editor for the News Management Pages.
Yes
No

- **Display News Tab** – if enabled, the troubleshooter tab will be displayed and accessible within the staff control panel (see navigation menu bar in the staff control panel).
- **Enable WYSIWYG Editor** – if enabled, the what-you-see-is-what-you-get editor will be enabled for creating and editing news articles.

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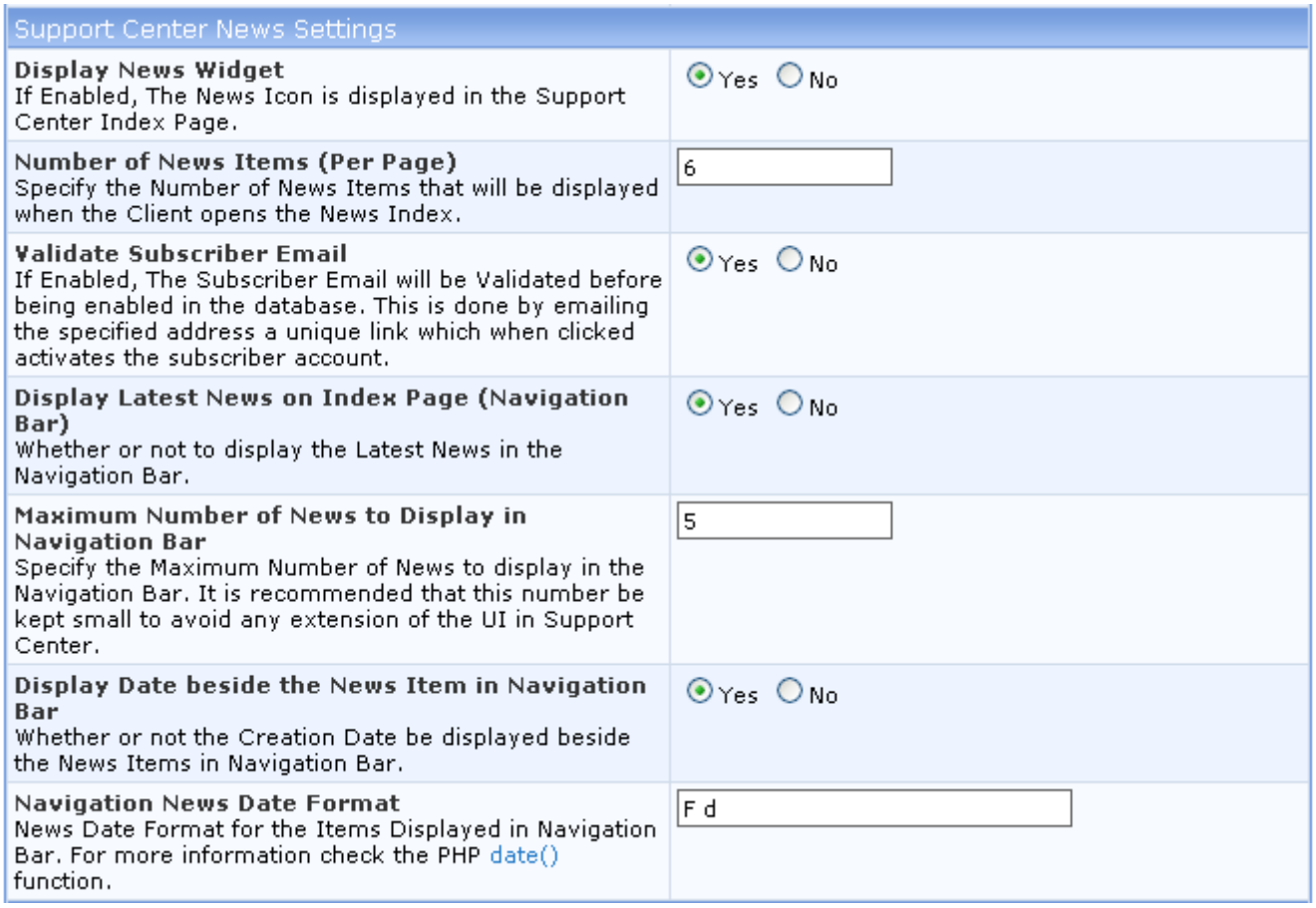
Support center


Support Center News Settings
Display News Widget
If Enabled, The News Icon is displayed in the Support Center Index Page.
Yes
No
Number of News Items (Per Page)
Specify the Number of News Items that will be displayed when the Client opens the News Index.
6
Validate Subscriber Email
If Enabled, The Subscriber Email will be Validated before being enabled in the database. This is done by emailing the specified address a unique link which when clicked activates the subscriber account.
Yes
No
Display Latest News on Index Page (Navigation Bar)
Whether or not to display the Latest News in the Navigation Bar.
Yes
No
Maximum Number of News to Display in Navigation Bar
Specify the Maximum Number of News to display in the Navigation Bar. It is recommended that this number be kept small to avoid any extension of the UI in Support Center.
5
Display Date beside the News Item in Navigation Bar
Whether or not the Creation Date be displayed beside the News Items in Navigation Bar.
Yes
No
Navigation News Date Format
News Date Format for the Items Displayed in Navigation Bar. For more information check the PHP date() function.
F d

- **Display News Widget** – if enabled, the news widget will be displayed in the client support interface (see what is a widget, in the frequently asked questions).
- **Number of News Items (Per Page)** – the maximum number of news items to list on one page (in the client support interface), before being paginated onto other pages.
- **Validate Subscriber Email** – if enabled, the subscribing user will be required to validate his or her e-mail address by clicking on a verification link sent to their address.
- **Display Latest News on Index Page (Navigation Bar)** – if enabled, the latest news announcements will be displayed on the index page's navigation bar, within the client support interface.
- **Maximum Number of News to Display in Navigation Bar** – the maximum number of recent news articles to list (dependant on the *Display Latest News on Index Page* setting).
- **Display Date beside the News Item in Navigation Bar** – if enabled, the date of posting will be displayed next to each recent article listing (dependant on the *Display Latest News on Index Page* setting).
- **Navigation News Date Format** – specify the format of the creation of each news article. This value should accord to the PHP date() function, documented at www.php.net/date.

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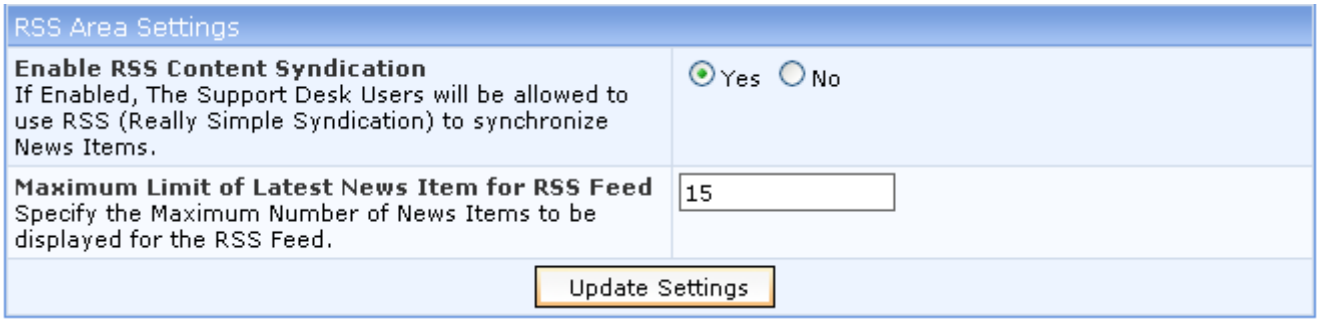
RSS interface


RSS Area Settings
Enable RSS Content Syndication
If Enabled, The Support Desk Users will be allowed to use RSS (Really Simple Syndication) to synchronize News Items.
Yes
No
Maximum Limit of Latest News Item for RSS Feed
Specify the Maximum Number of News Items to be displayed for the RSS Feed.
15
Update Settings

- **Enable RSS Content Syndication** – if enabled, RSS feeds of news articles will be made available via the client support interface. See what is an RSS feed, in the frequently asked questions.

- **Maximum Limit of Latest News Item for RSS Feed** – the maximum number of preview characters for each article, for each RSS feed listing.

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Templates

The templates are based on **template groups**, which can be seen as template "packs". As well as being able to have a completely different "style", template groups can also serve a further purpose – such as departments that only display for a certain template group, and so on.

A *different* template group should be thought of as almost a *different* support desk.

A template group can act in many ways as a completely different support desk – with a different style, knowledgebase categories, troubleshooter categories, news announcements, departments and company name. All of the modules mentioned (such as knowledgebase) include options to tie a category to a template group. For more information, see the module's respective staff control panel manual areas.

An example use of using such template groups is if your company trades as several other companies or has several different and unrelated branches.

Licensing notice: *Please note that as per the license terms of Kayako's SupportSuite, eSupport and LiveResponse products, you must not resell "spaces" on your support desk installation (in the form of (but not limited to) template groups and departments).*

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Template engine

The templating system of SupportSuite, eSupport and LiveResponse is a database-driven system, meaning that the templates for all the components of the client support interface theme are stored in the database, and compiled together when a page of the client support interface is loaded.

Kayako SupportSuite, eSupport and LiveResponse use the **SmartyLight** templating engine (recently renamed to **TemplateLite**). You can find documentation of TemplateLite syntax here: http://templatelite.sourceforge.net/docs/index.html.

Staff control panel and administrator control panel themes are **not** managed by the internal template system. The files for these are "flat" (files stored in the file system). They can be found in the ../themes/ directory of your installation.

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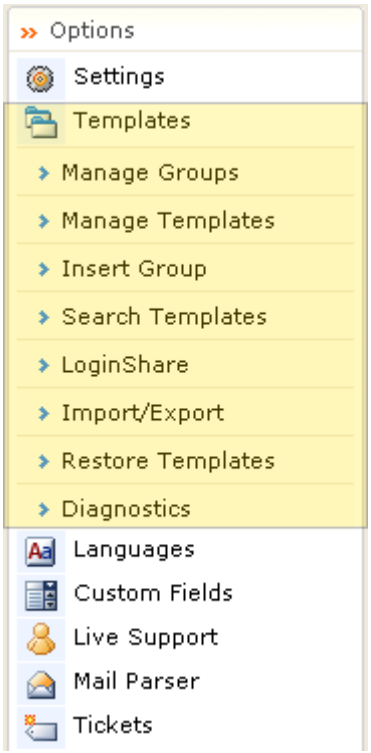
Template groups

To view and manage template groups:

1. Click on **Manage Groups** under Templates on the Options menu, as shown below.



You will be presented with a list of all the template groups (packs) installed on the system, as shown below.

If you have not installed ant additional template packs, then only one **default** template group should be listed.

To **delete** a template group, click on the respective delete icon.

To **restore** an entire template group's template to their **originals**, click on the restore icon. For more information on restoring templates, see restoring templates.

To **export** a template group, click on the respective export icon. You will be asked to save a file to disk – this is an XML data file containing all of the templates and template settings for this template group. For more information on importing and exporting templates, see importing and exporting templates.

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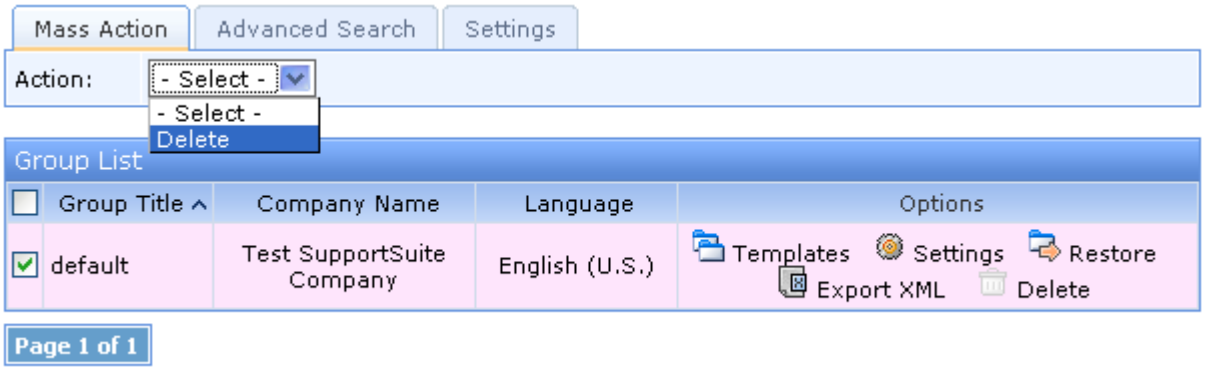
Selecting multiple template groups (by checking the corresponding check boxes, as shown below) will open the mass-management menu, as shown below. Using this menu, groups can be mass-deleted. Under the **Advanced Search** tab, groups can be searched for by template name and company name. Under the **Settings** tab, the number of groups shown per page (if there are many) can be limited.



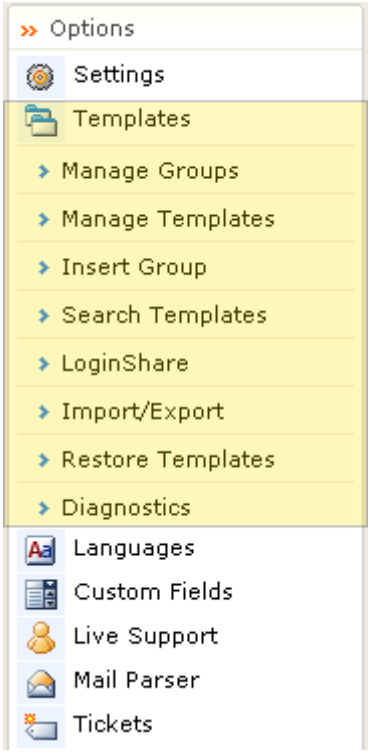
To **edit** the settings of a template group, click on the respective edit icon. You will be presented with a list of the editable settings for this group.

Refer to template group fields for documentation on the required fields for creating a new template group.

Creating a new template group

To create a new template group:

1. Click on **Insert Group** under Templates on the Options menu, as shown below.



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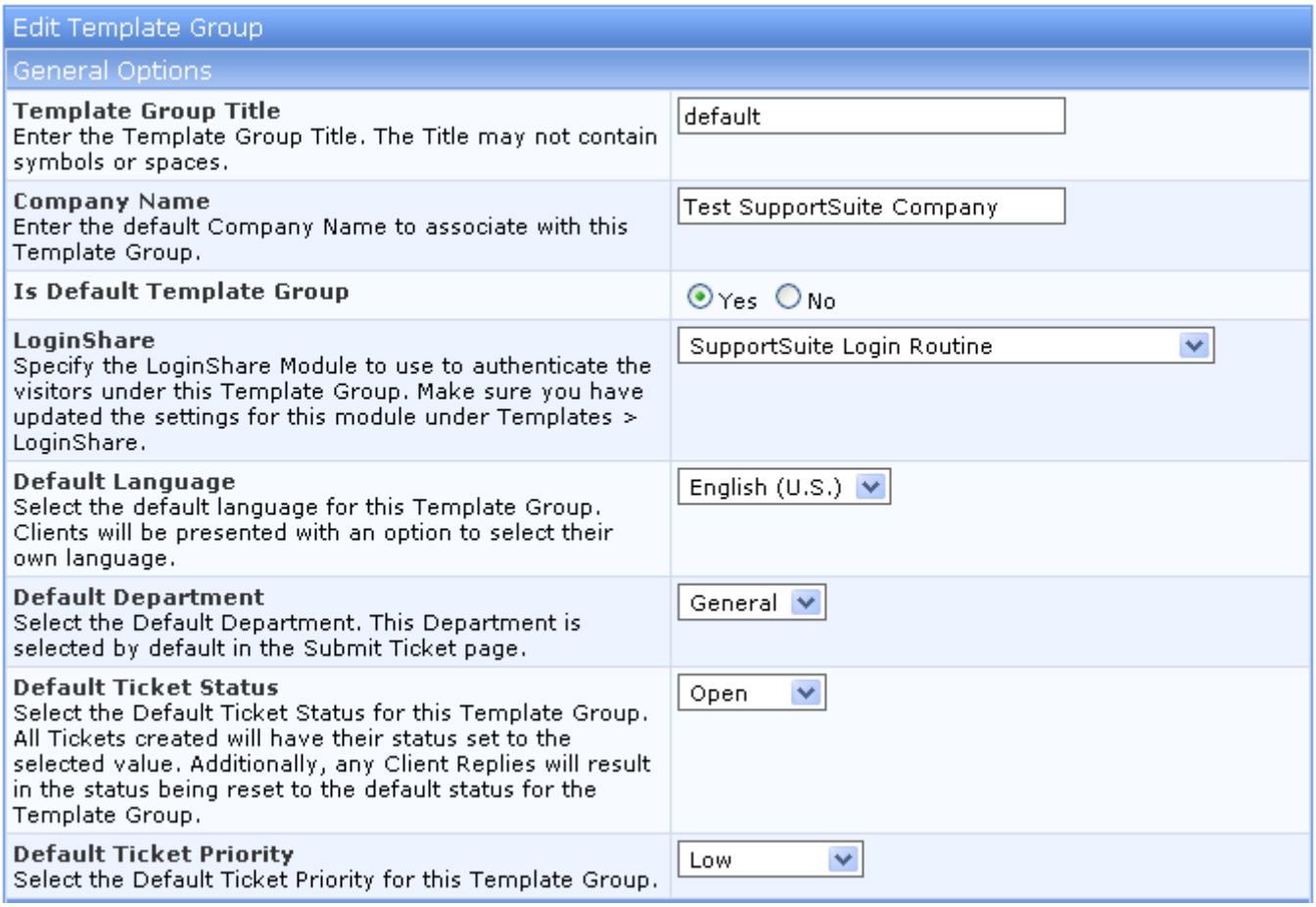
You will be presented with a list of the editable settings for this group. Refer to template group fields for documentation on the required fields for creating a new template group.

Template group fields


Edit Template Group
General Options
Template Group Title
Enter the Template Group Title. The Title may not contain symbols or spaces.
default
Company Name
Enter the default Company Name to associate with this Template Group.
Test SupportSuite Company
Is Default Template Group
Yes
No
LoginShare
Specify the LoginShare Module to use to authenticate the visitors under this Template Group. Make sure you have updated the settings for this module under Templates > LoginShare.
SupportSuite Login Routine
Default Language
Select the default language for this Template Group. Clients will be presented with an option to select their own language.
English (U.S.)
Default Department
Select the Default Department. This Department is selected by default in the Submit Ticket page.
General
Default Ticket Status
Select the Default Ticket Status for this Template Group. All Tickets created will have their status set to the selected value. Additionally, any Client Replies will result in the status being reset to the default status for the Template Group.
Open
Default Ticket Priority
Select the Default Ticket Priority for this Template Group.
Low

General Options

- **Template Group Title** – the title of the template group.
- **Company Name** – this name is used for branding the client support interface and is also used in outgoing e-mails. However, it only works for outgoing e-mails where the clients submits a ticket via the client support interface (and specific template group) and any staff reply, assuming the template group for a ticket has been set.
- **Is Default Template Group** – if enabled, this template group will be the default.
- **LoginShare** – which login routine (out of those enabled in the LoginShare configuration) this template group should use.
- **Default Language** – the default language set that this template group will use.
- **Default Department** – when a user goes to submit a ticket to the support desk, this department will be the default selected department.

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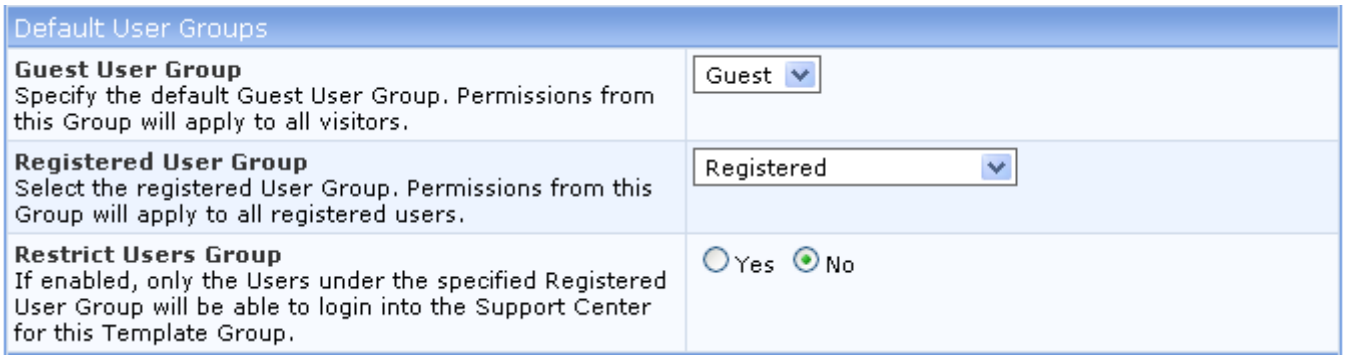
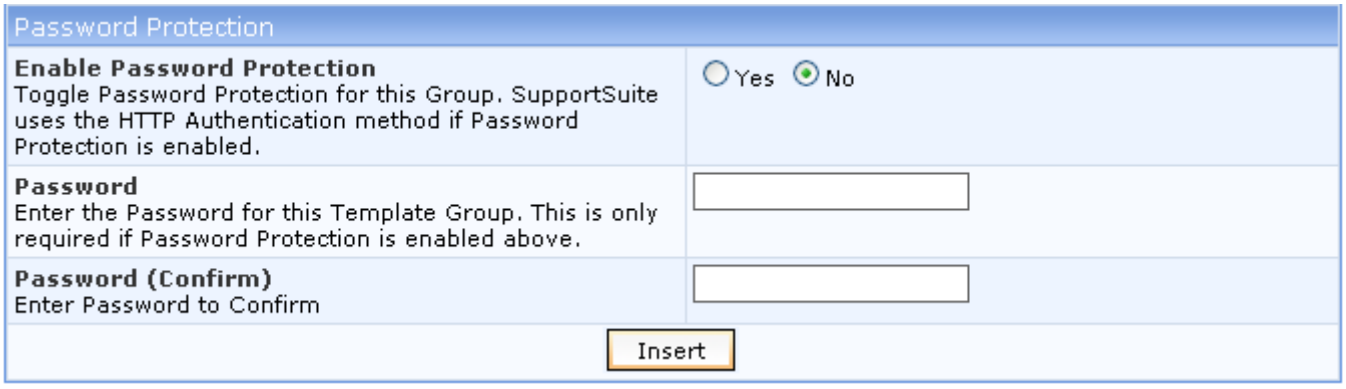
- **Default Ticket Status** – all newly tickets created via this template group will be set to this status.
- **Default Ticket Priority** – all newly tickets created via this template group will be set to this priority, unless changed by the ticket creator before he or she submits the ticket.


Default User Groups
Guest User Group
Specify the default Guest User Group. Permissions from this Group will apply to all visitors.
Guest
Registered User Group
Select the registered User Group. Permissions from this Group will apply to all registered users.
Registered
Restrict Users Group
If enabled, only the Users under the specified Registered User Group will be able to login into the Support Center for this Template Group.
Yes
No

Default User Groups

User groups are managed within the staff control panel (see users and groups in the staff control panel manual for thorough users and groups documentation).

- **Guest User Group** – define here what user group will act as the global "guest" user group (any visitor to your support desk under this template group who is **not** logged in).
- **Registered User Group** – define here what user group a user who registers via the client support interface under this template group will be put into.
- **Restrict Users Group** – if enabled, only users who are registered for the defined user group will be able to login and use this support desk. If disabled, a user is already registered and part of any other user group will be able to login to this support desk under this template group.


Password Protection
Enable Password Protection
Toggle Password Protection for this Group. SupportSuite uses the HTTP Authentication method if Password Protection is enabled.
Yes
No
Password
Enter the Password for this Template Group. This is only required if Password Protection is enabled above.
Password (Confirm)
Enter Password to Confirm
Insert

Password Protection

- **Enable Password Protection** – if enabled, no user will be able to access the client support interface under this template group without entering the password (see below), set in the **Password** field.

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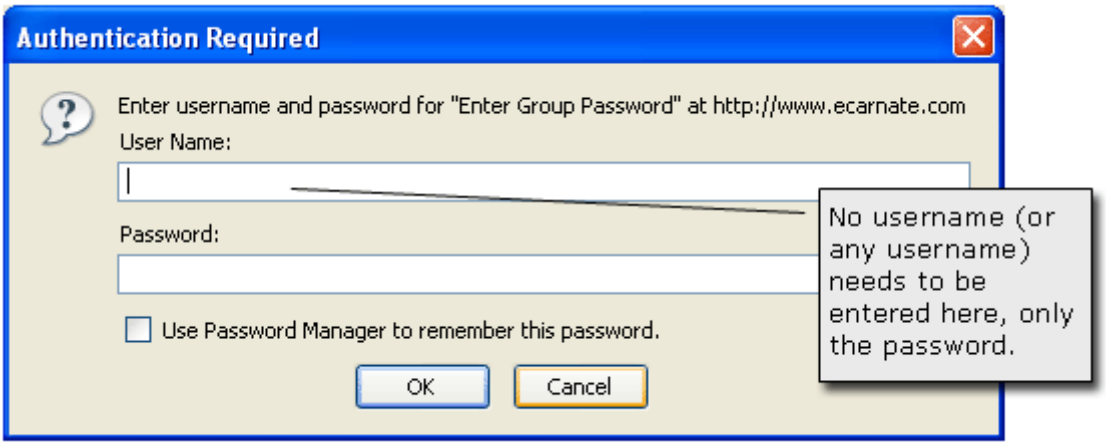
Authentication Required
Enter username and password for "Enter Group Password" at http://www.ecarnate.com
User Name:
Password:
Use Password Manager to remember this password.
OK
Cancel
No username (or any username) needs to be entered here, only the password.

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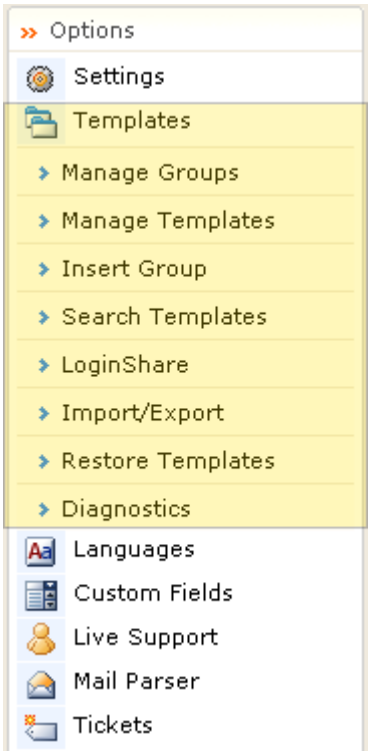
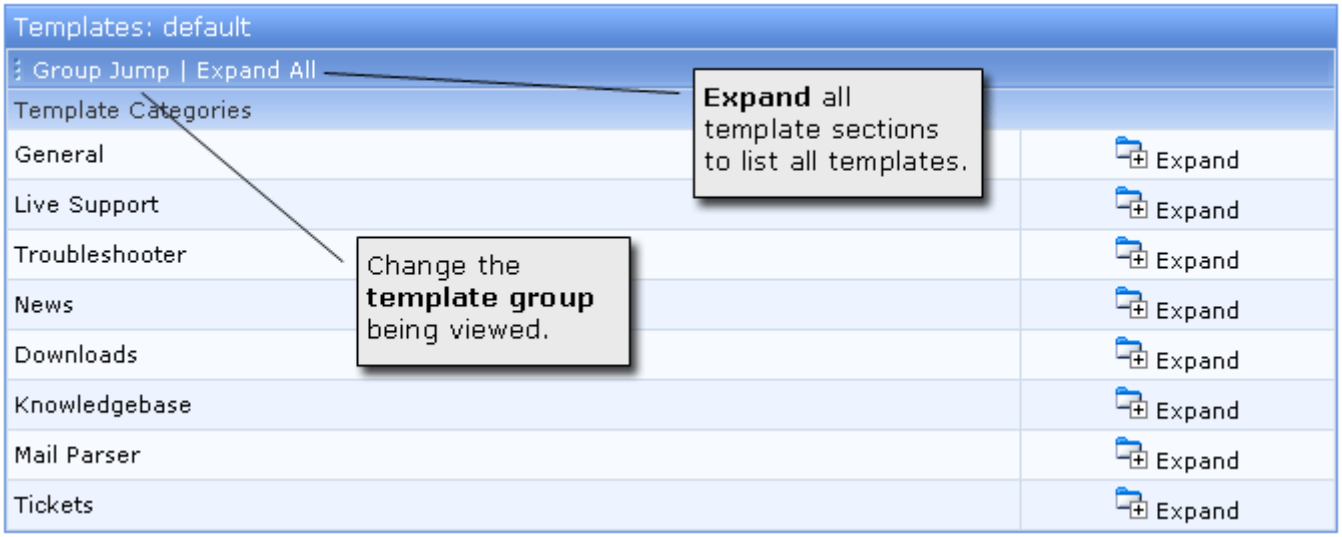
Managing templates

To manage templates within a group:

1. Click on **Manage Templates** under Templates on the Options menu, as shown below.



Templates within a **template group** are categorized into sections for your convenience (making it easier to source a template according to it's relevance on the client support interface). You will be presented with a list of template categories for the **default template**, as shown below.



To view templates within a section, click on the section's respective expand icon. To switch the **template group** you are viewing, use the **Group Jump** link, as indicated to above.

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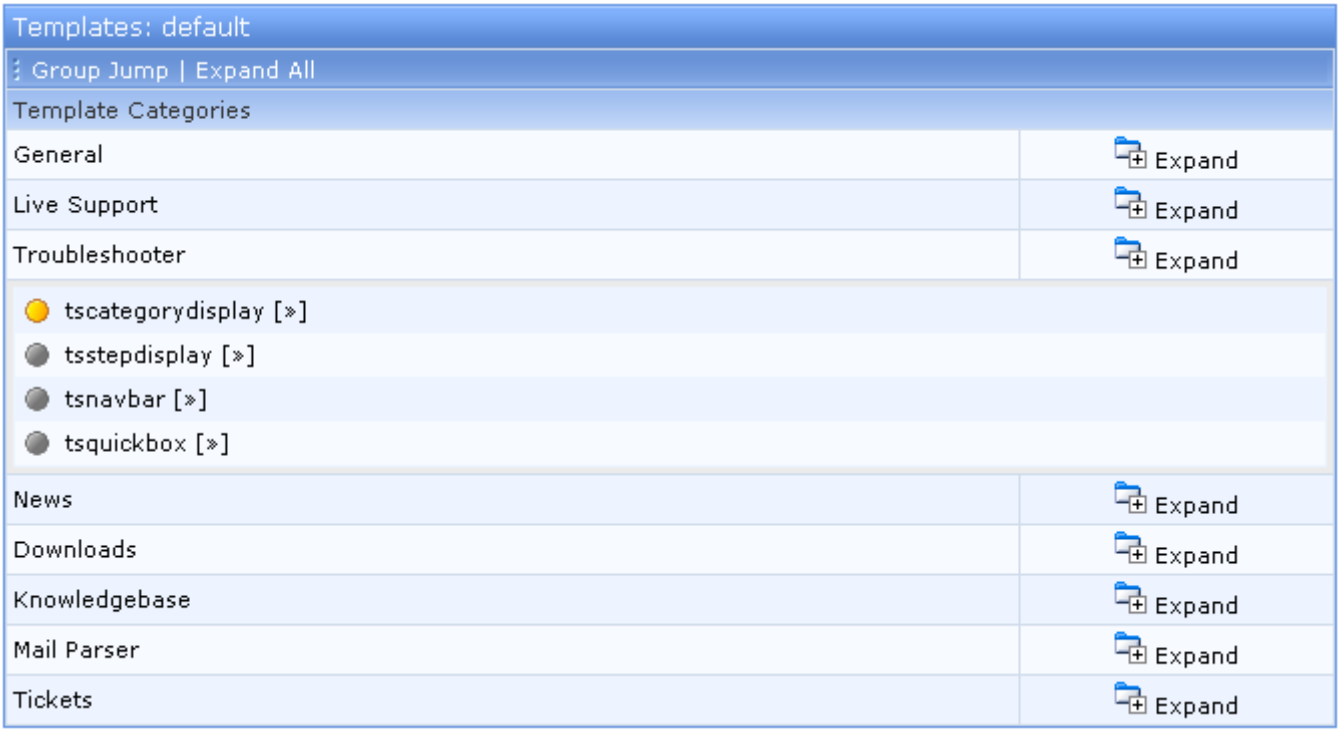
To expand all the template sections, click on the **Expand** All link, as shown above. All templates within the section will be listed, as shown below.



Each template has an indicator icon, which is either gray, yellow or red.

- the template is **unmodified** and in its original state.
- the template is **modified**.
- the template has been updated. The template requires an **upgrade revert** to implement the changes to the template made as part of a SupportSuite, eSupport or LiveResponse upgrade. In other words, the original version of the template has been modified in between software versions. A revert will restore a template to it's *original state*. For more information on template reverting, see restoring templates.

To **edit** a template, click on the respective template's name. The contents of that template will be shown to you in a text area, as shown below.

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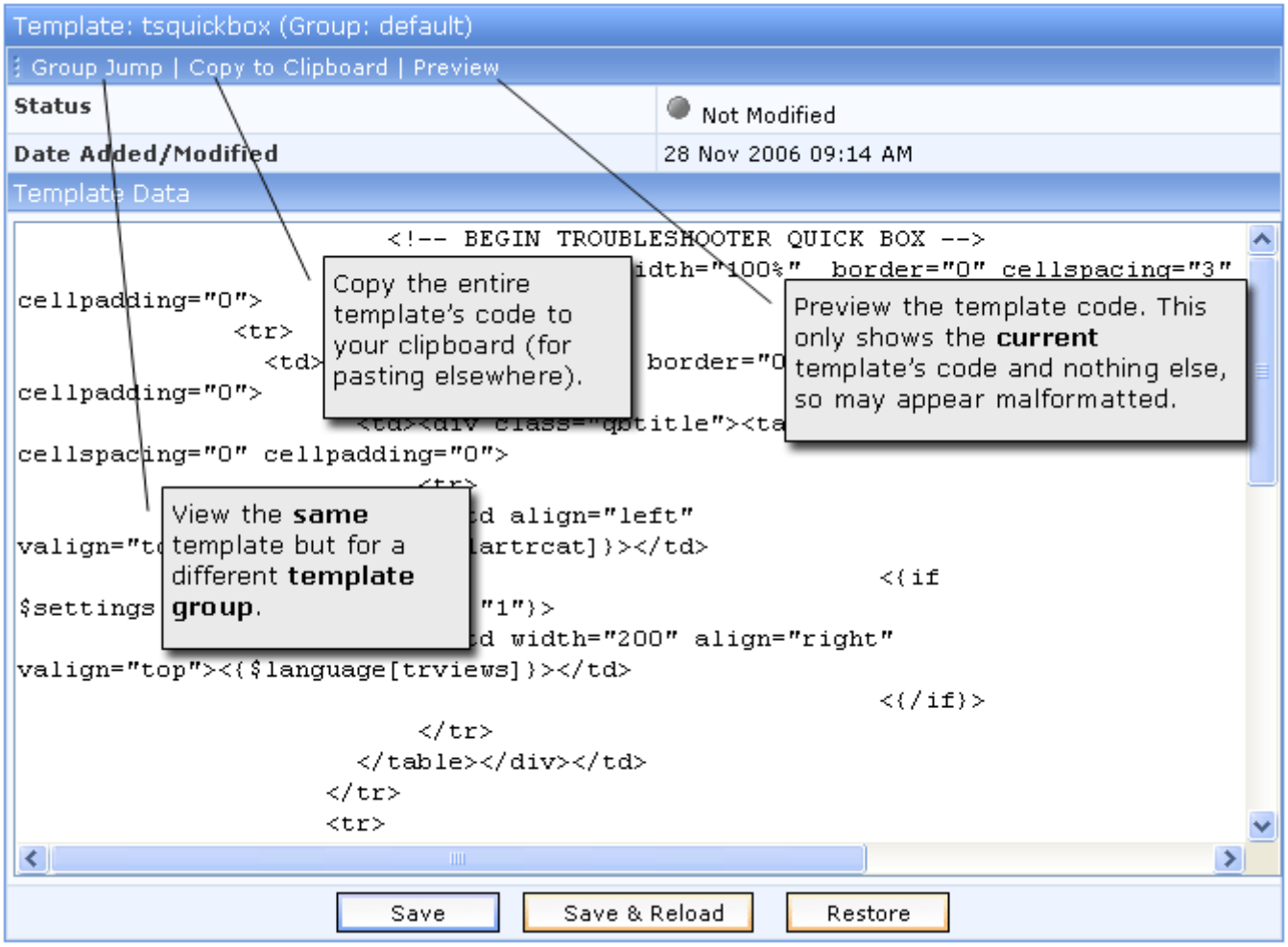
Template: tsquickbox (Group: default)
Group Jump | Copy to Clipboard | Preview
Status
Not Modified
Date Added/Modified
28 Nov 2006 09:14 AM
Template Data
Copy the entire template's code to your clipboard (for pasting elsewhere).
Preview the template code. This only shows the current template's code and nothing else, so may appear malformatted.
View the same template but for a different template group.
Save
Save & Reload
Restore

To save change to the template code, click on the **Save** button – following this, you will be taken back to the templates list.

To save changes and then return to this template, click on the **Save & Reload** button.

To revert a template back to its original, click on the **Restore** button. For more information on template reverting, see [restoring templates](#).

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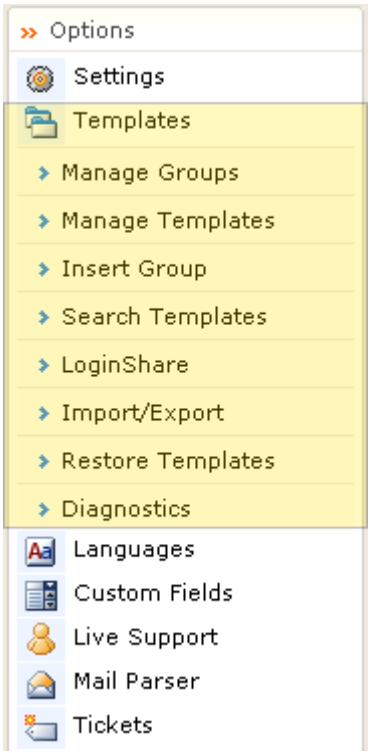
Searching templates

To search within templates:

1. Click on **Search Templates** under Templates on the Options menu, as shown below.



Searching templates is relatively simple – a **template group** is selected (to search within), and a search phrase entered.

The search feature is useful for sourcing template code. For example, within the client support interface you may look at the HTML code that makes up the pages, find an area you want to change and not know which template to edit.

To save you from going through all of the templates, you can simply search for a small portion of HTML code relative to the area you wish to edit – hopefully, the template that is relative to this area will come up in the search results. It is largely a process of trial and error.

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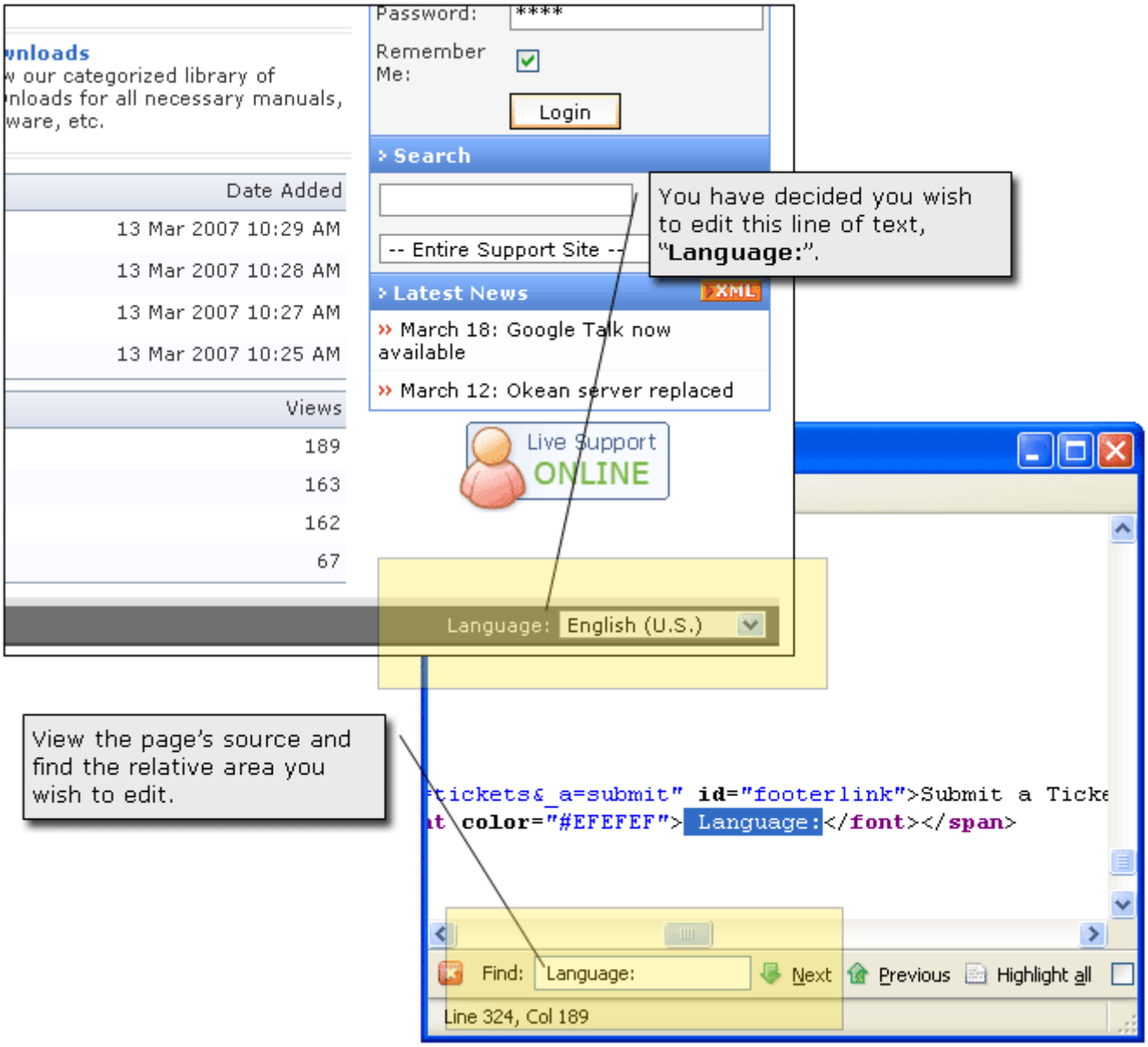

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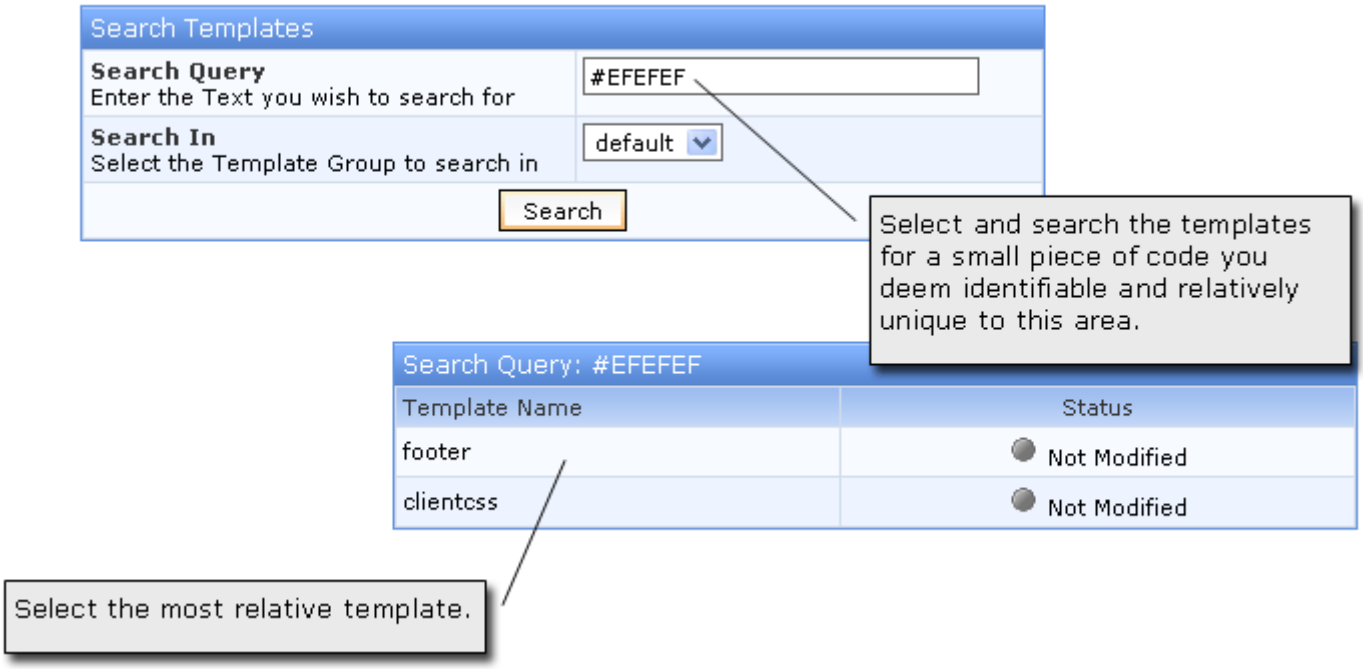

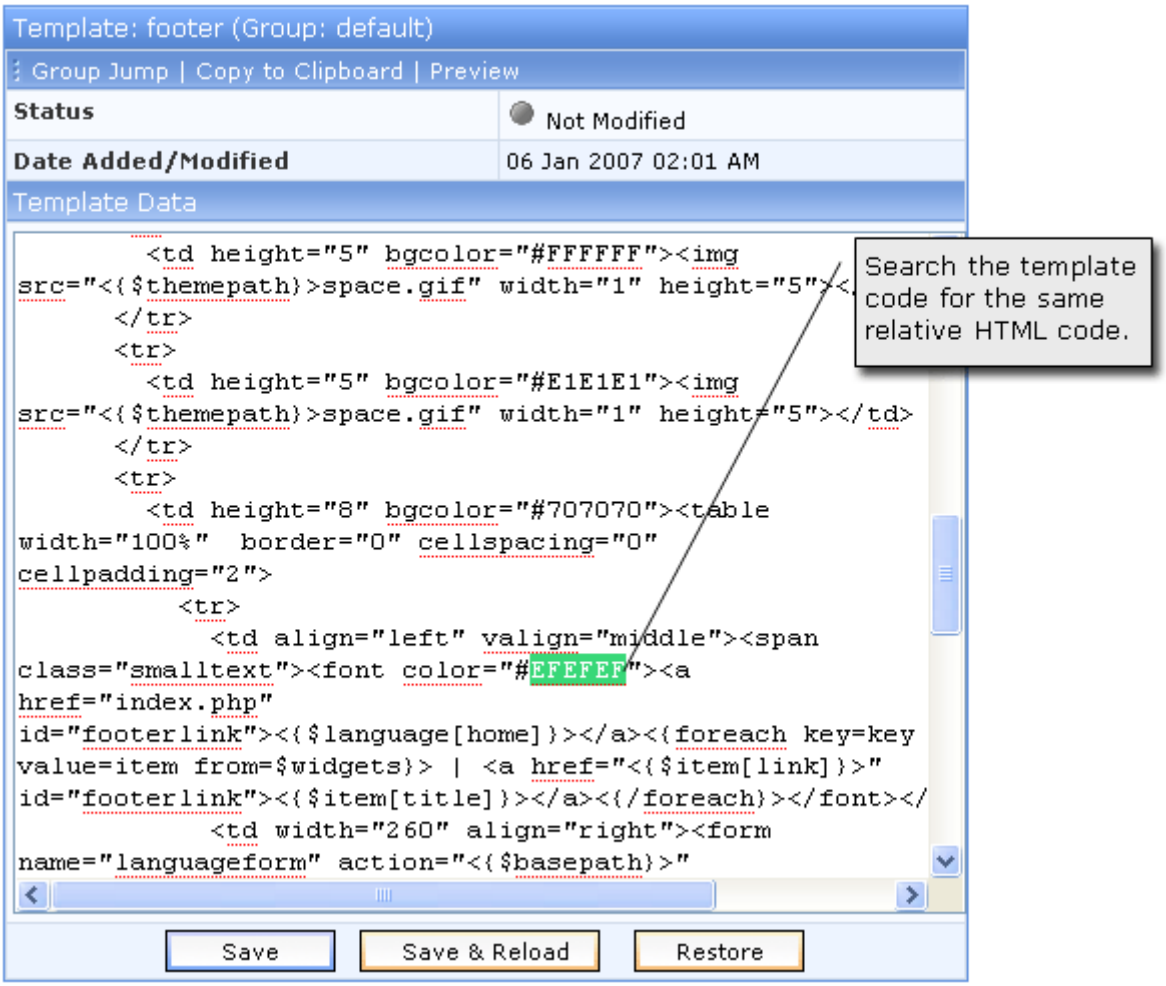

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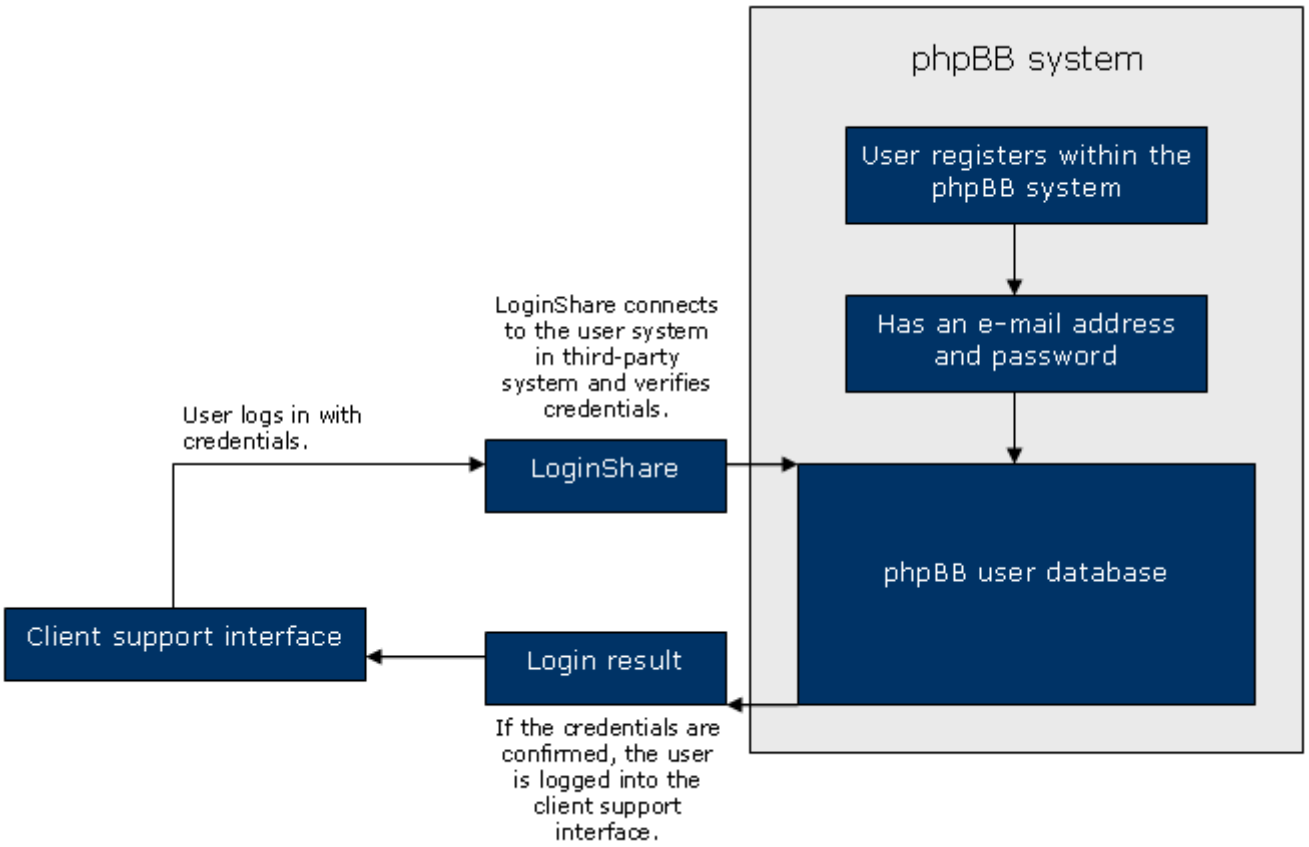
LoginShare

LoginShare is the login system that powers client support interface user authentication.

This abstract system allows you to integrate a user system of an **external third party application** with SupportSuite, eSupport or LiveResponse, and then use this user system as a way for users to log into the client support interface with.

See the example diagram below, describing a LoginShare routine procedure between SupportSuite and a phpBB installation (www.phpbb.com).


phpBB system
User registers within the phpBB system
Has an e-mail address and password
phpBB user database
LoginShare connects to the user system in third-party system and verifies credentials.
User logs in with credentials.
LoginShare
Client support interface
Login result
If the credentials are confirmed, the user is logged into the client support interface.

A different LoginShare module can be selected for different template groups (see template groups). The LoginShare module a template group uses is defined under the settings for each template group.

The default SupportSuite, eSupport and LiveResponse login routine is named under LoginShare as **SupportSuite Login Routine**.

Before you can start using different LoginShare routines, you must configure the respective modules by adding the database connection information, so that LoginShare can find the third-party user database. To configure the LoginShare modules:

1. Click **LoginShare** under Templates on the Options menu, as shown below.

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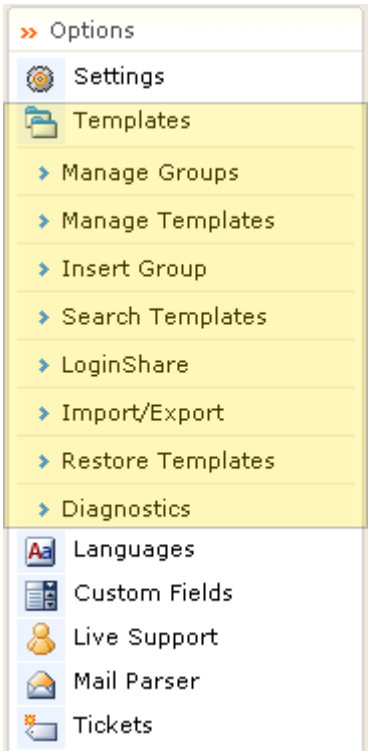

You will be presented with a list of all the LoginShare modules installed in the system, as shown below.

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Plugin List	
LoginShare Plugin	Options
SupportSuite Login Routine	Settings
ModernBill	Settings
ModernBill v5	Settings
vBulletin	Settings
X-Cart	Settings
Microsoft Active Directory/LDAP	Settings
Microsoft Active Directory/LDAP (SSL)	Settings
Advanced Webhost Billing System (AWBS)	Settings
osCommerce	Settings
Invision Power Board	Settings
PHPBB	Settings
IONO License Manager	Settings
Plexum	Settings
PHPAudit v2	Settings
WHM.AutoPilot v3 Billing System	Settings
Ticker Purchaser	Settings
Simple Machines Forum	Settings
MyBB	Settings
XMB	Settings
Clientexec	Settings
H-Sphere XML-API	Settings
Joomla CMS	Settings
PHPProBid	Settings
CubeCart	Settings

To edit the settings of a specific LoginShare module, click on the respective settings icon. One the information to the database in which the data for the third party application is installed is required, as shown below.

ModernBill v5	
Hostname	
DB Name	
DB User	
DB Password	
Update	

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- **Hostname** – the hostname of the database server to connect to. If the database resides on the same server as your SupportSuite, eSupport or LiveResponse installation, use **localhost** as the hostname.
- **DB Name** – the name of the database containing the third-party application user database.
- **DB User** – the username with which to connect to the database specified in *DB Name*.
- **DB Password** – the password for the *DB User*.

Click on the **Update** button to save the changes.

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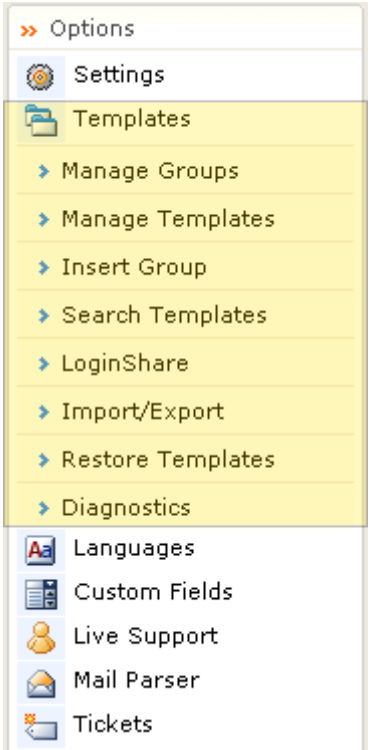
Importing and exporting templates

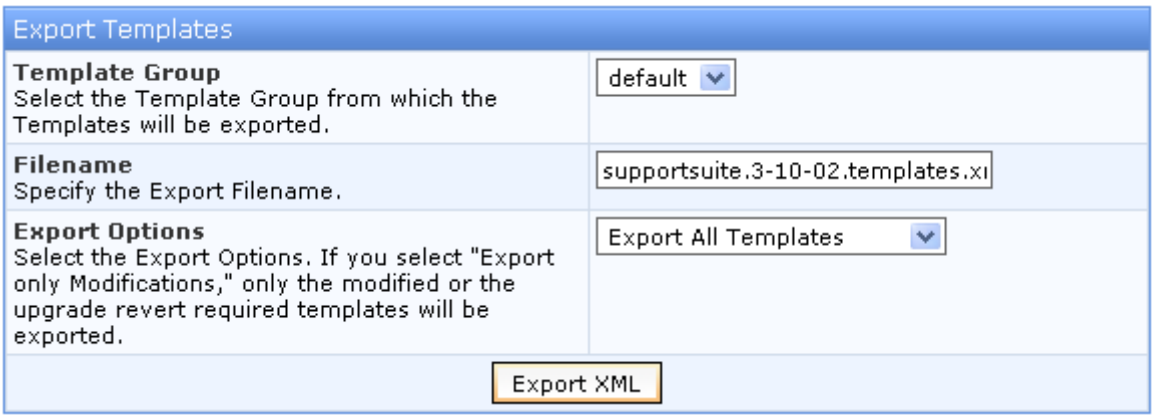
Template groups can be exported as template packs, exporting all of the template group settings and actual templates into one XML file. These template files can be backed up, moved to other installations or shared. This same XML file can also be imported directly into your SupportSuite, eSupport and LiveResponse installation.

You can download template packs that have been released by community members at the Kayako forums (http://forums.kayako.com).

1. Click **Import/Export** under Templates on the Options menu, as shown below.



You will be presented with both import and export options, as shown below.


Export Templates
Template Group
Select the Template Group from which the Templates will be exported.
default
Filename
Specify the Export Filename.
supportsuite.3-10-02.templates.xml
Export Options
Select the Export Options. If you select "Export only Modifications," only the modified or the upgrade revert required templates will be exported.
Export All Templates
Export XML

- **Template Group** – select the template group you wish to generate and download a template pack for.

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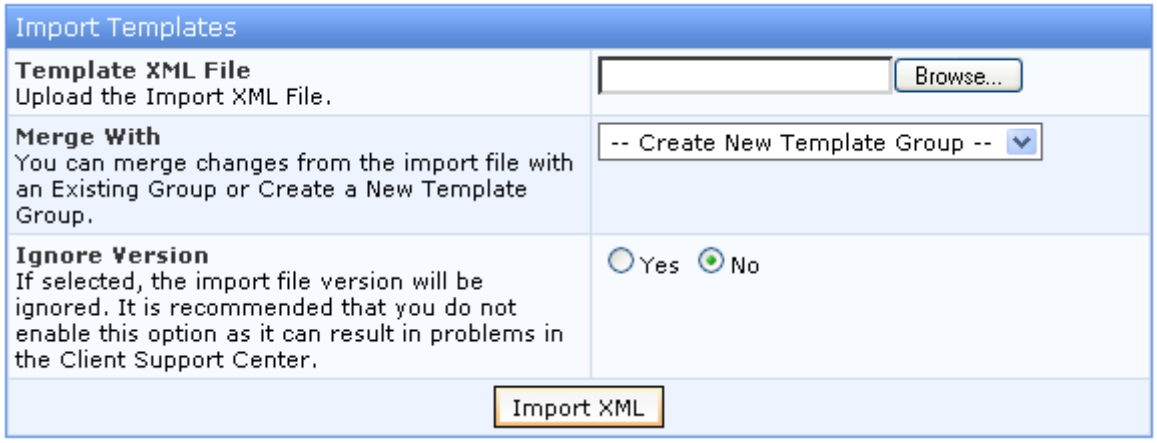
- **Filename** – specify the filename you desire for the exported template pack.
- **Export Options** – if set to **Export only Modifications**, only templates that are different to their originals will be exported. If set to **Export All Templates**, all templates will be exported regardless.

Click on the **Export XML** button to export the template back. You will be prompted to save the file to a location on your hard disk drive.


Import Templates
Template XML File
Upload the Import XML File.
Browse...
Merge With
You can merge changes from the import file with an Existing Group or Create a New Template Group.
-- Create New Template Group --
Ignore Version
If selected, the import file version will be ignored. It is recommended that you do not enable this option as it can result in problems in the Client Support Center.
Yes
No
Import XML

- **Template XML File** – click on the **Browse** button to open up a file selector, that will allow you to select an XML template pack file form your hard disk drive.
- **Merge With** – it is possible to merge templates into an existing template group with importing. If two templates have been modified in both the destination template group and the source template pack, the pack that is being imported will take precedence and over-write the source..
- **Ignore Version** – if the template pack you are importing has a version different to your current installation of SupportSuite, eSupport or LiveResponse, the system will return an error. To prevent this from happening, enable this setting. Importing template packs that are within just a few versions of your current may not give any problems. However, if you attempt to use a template pack much older than your installation then you may come across problems involving missing or outdated templates.

Click on the **Import XML** button to proceed with the template import.

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Restoring templates

Restoring (also known as reverting) templates involves the mass-restore of templates back to their original state. Every template is stored with both an "original" version and a "modified" version. Unless customized, the original version of the template will contain the template that came with the installation of the current version of SupportSuite, eSupport or LiveResponse that you are running. Therefore, to restore a template back to it's originals means that all modifications to the template will be lost.

After **upgrading your installation** of SupportSuite, eSupport or LiveResponse, you may need to restore some templates. This is because the newer version of the software may carry with it newer versions of templates. Rather than overwriting your customized templates, the upgrade system will simply mark templates that have had their **originals updated** as **"Upgrade Revert Required"**.

It may be such that you do need to revert the templates that have been updated so that new functionality can be implemented. This is particularly typical of updates to the live chat features of SupportSuite and LiveResponse – where an update to the chat procedure has occurred, quite often the templates have also been updated.

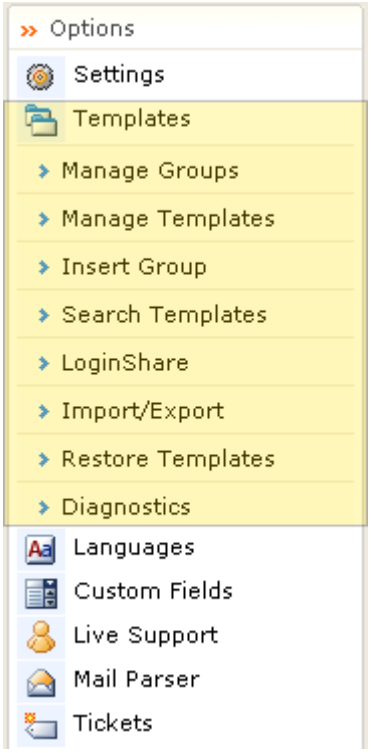
It may also be the case that you have made an error in one of your template modifications, and wish to start again.

Restoring a template will revert a template back to the template's original state. All modifications for that template would subsequently be lost.

Templates that require an upgrade revert are marked with a red icon (see managing templates).

To quickly list all templates that have been customized and/or require an upgrade revert:

1. Click **Restore Templates** under Templates on the Options menu, as shown below.



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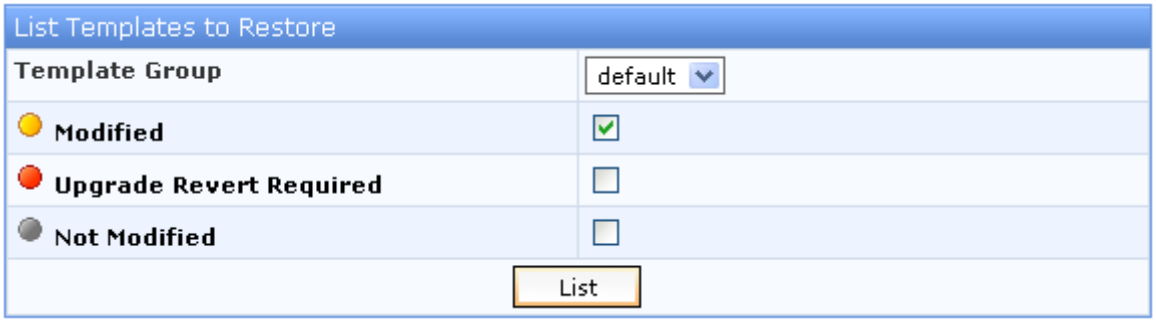

- **Template Group** – select the template group you wish to find and restore templates in.
- **Select template statuses:**
    - **Modified** – if enabled, all templates that have been customized in some way will be restored to their original states.
    - **Update Revert Required** – if enabled, all templates that have newer original versions will be restored to their new, original states.
    - **Not Modified** – if enabled, all templates that have not been customized or require an upgrade revert will be restored.

Click on the **List** button to perform the search.

All the templates that have been customized (as in this example, we searched only for **modified** templates) are listed in the search results, as shown below.

From the results, you can select multiple templates (by clicking on the corresponding checkboxes) and restore them, by clicking on the **Restore** button.

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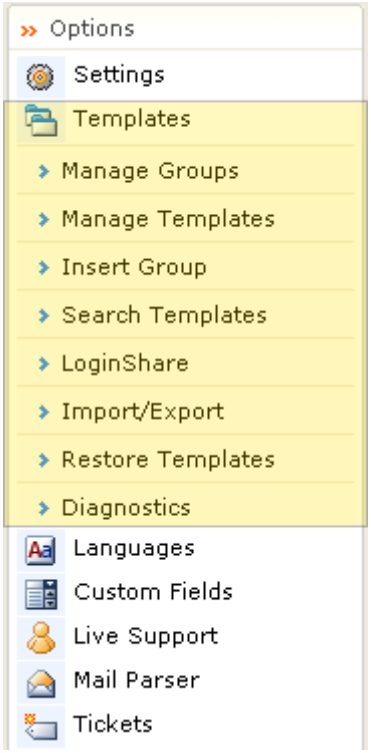
Template diagnostics

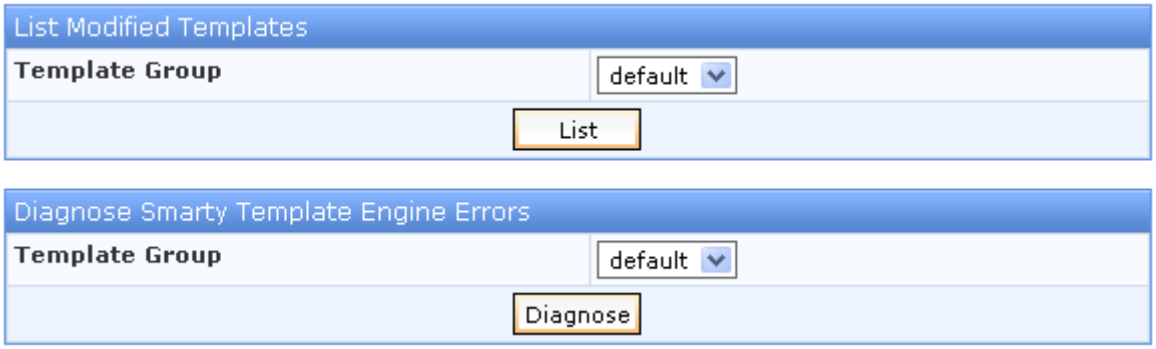
Using the template diagnostic tools, you can diagnose **template errors** as well as list **all modified templates**.

To perform template diagnostics:

1. Click **Diagnostics** under Templates on the Options menu, as shown below.



As shown below, you are able to select a **template group** and either list it's modified templates (click on the **List** button) or diagnose template errors (click on the **Diagnose** button).



For more information on the template engine that SupportSuite, eSupport and LiveResponse use, see template engine.

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Languages

The languages system of is based on language **packs** that are exportable and importable. Each pack is made up of a large database of **phrases** that is referenced to by standard variable names, throughout the system.

Note: The language packs here only cover the client support interface languages.

Language packs are selectable in the footer of any client support interface page, as shown below.

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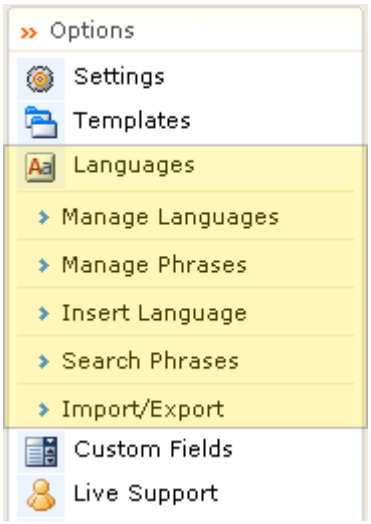
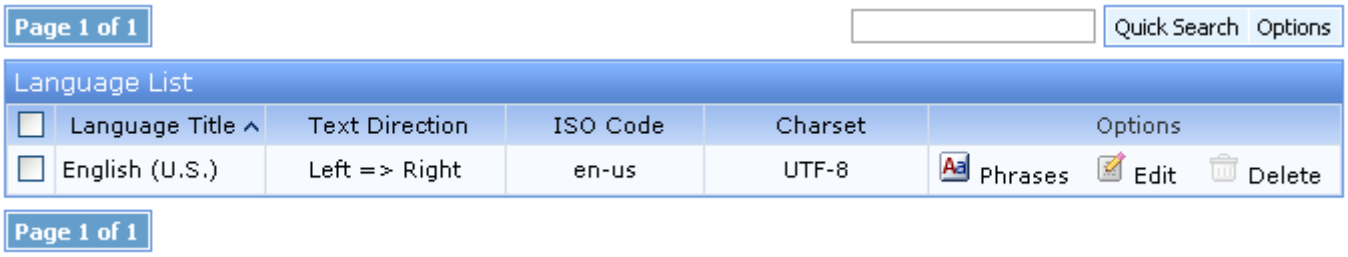
Managing language packs

To manage language packs:

1. Click on **Manage Languages** under the Languages menu, as shown below.



You will be presented with a list of all language packs currently installed in the system. If you have not added any custom language packs you should just see one, as shown below.



To **delete** a language, click on the respective delete icon. At least one language pack must be installed on the system; thus, the delete icon is unavailable for this one language pack.

To **manage** a language pack's phrases, click on the phrases icon (see managing phrases within a language pack).

Selecting multiple language packs (by checking the corresponding check boxes, as shown below) will open the mass-management menu, as shown below. Using this menu, packs can be mass-deleted. Under the **Advanced Search** tab, packs can be searched for by title, ISO code or their character-set (charset). Under the **Settings** tab, the number of packs shown per page (if there are many) can be limited.

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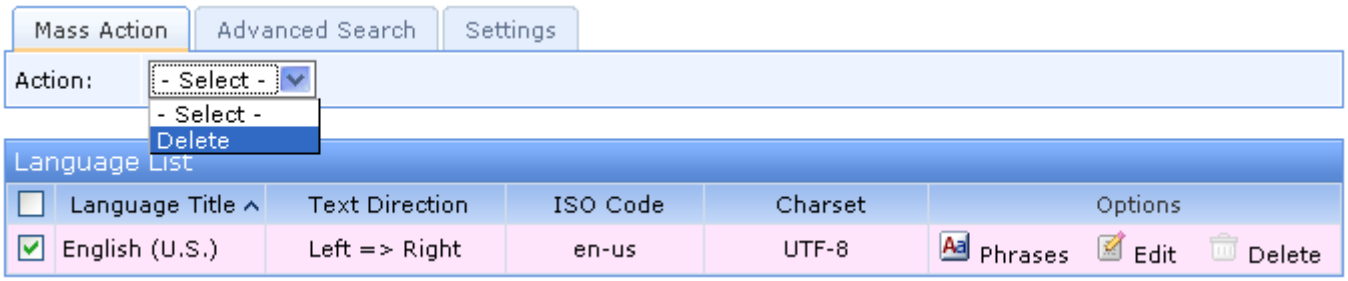
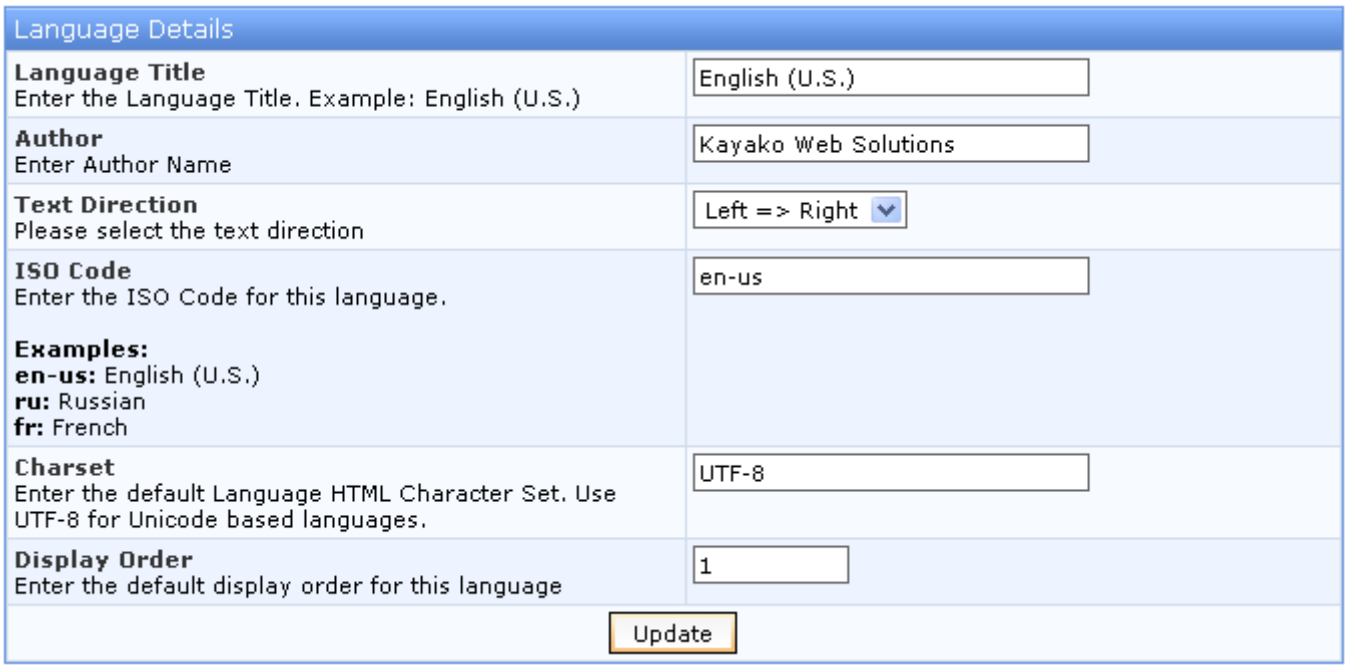


To **edit** a language, click on the respective edit icon. You will be presented with the editable fields for this language pack, as shown below.



- **Language Title** – the title of the language pack.
- **Author** – the author of the language pack.
- **Text Direction** – the direction of the text for this language (for example, the Hebrew language is a Right => Left language).
- **ISO Code** – the ISO (international standard) code for the language pack.
- **Charset** – the default character set for the language pack.
- **Display order** – the display order for the language pack (language packs are listed according to their display order).

Click on the **Update** button to save the changes to the language pack.

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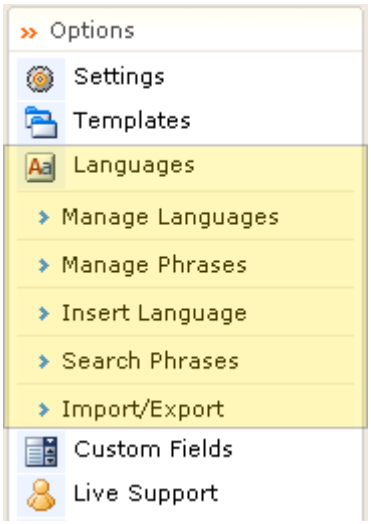
Managing phrases within a language pack

To manage phrases:

1. Click on **Manage Phrases** under the Languages menu, as shown below.



You will be presented with a paginated list of all the phrases within the first-order language (as shown below).

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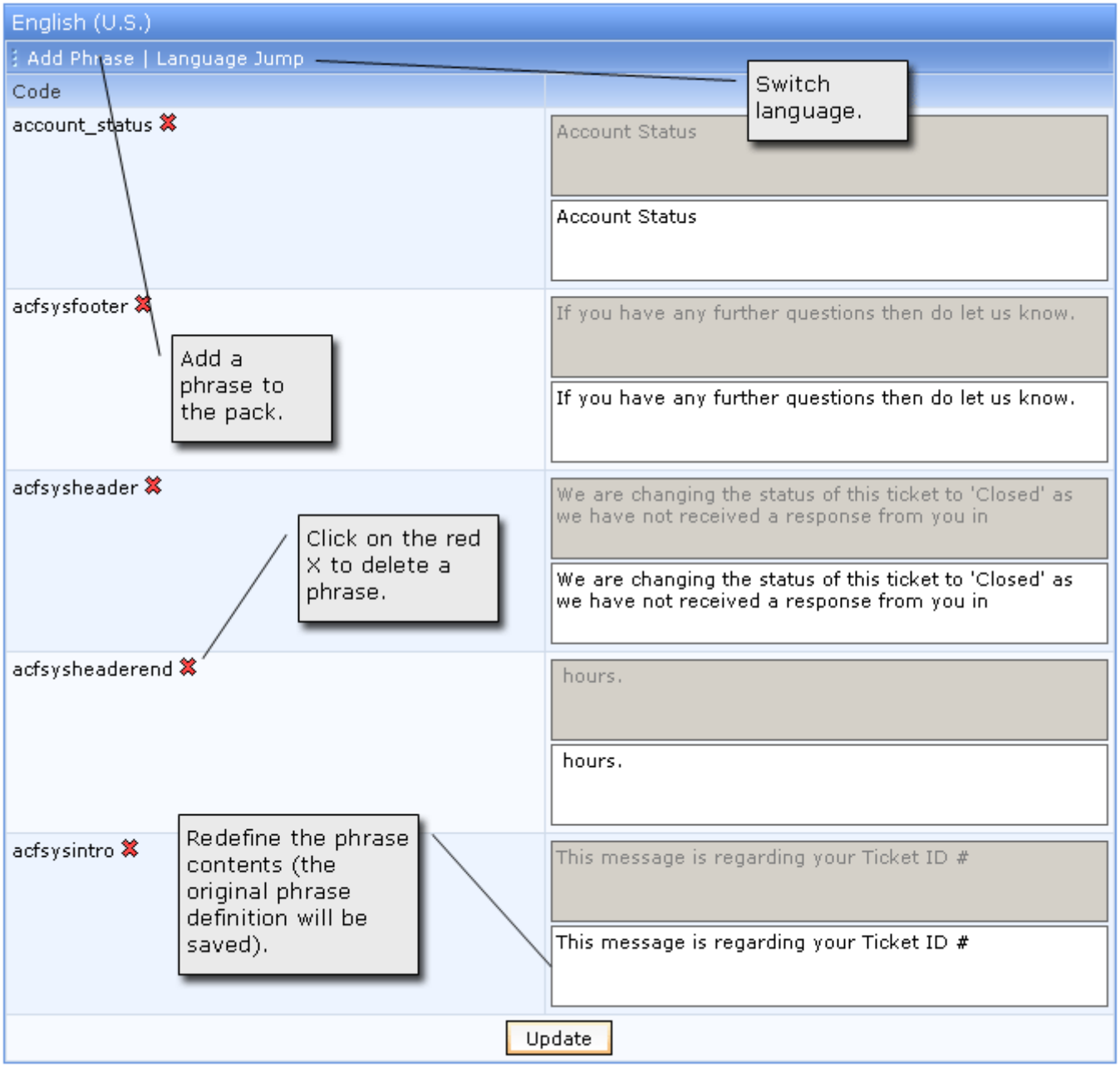
English (U.S.)
Add Phrase | Language Jump
Switch language.
Code
account_status
Account Status
Account Status
acfsysfooter
Add a phrase to the pack.
If you have any further questions then do let us know.
If you have any further questions then do let us know.
acfsysheader
Click on the red X to delete a phrase.
We are changing the status of this ticket to 'Closed' as we have not received a response from you in
We are changing the status of this ticket to 'Closed' as we have not received a response from you in
acfsysheaderend
hours.
hours.
acfsysintro
Redefine the phrase contents (the original phrase definition will be saved).
This message is regarding your Ticket ID #
This message is regarding your Ticket ID #
Update

To switch language, click on the **Language Jump** link (as indicated above). To create a new phrase in the current language pack, click on the **Add Phrase** link (also indicated above).

When redefining the contents of a phrase, the original contents of that phrase is saved – allowing you to go back and revert to the original at any time.

Click on the **Update** button to save any changes to phrases you have made.

Searching phrases

To search phrases:

1. Click on **Search Phrases** under the Languages menu, as shown below.

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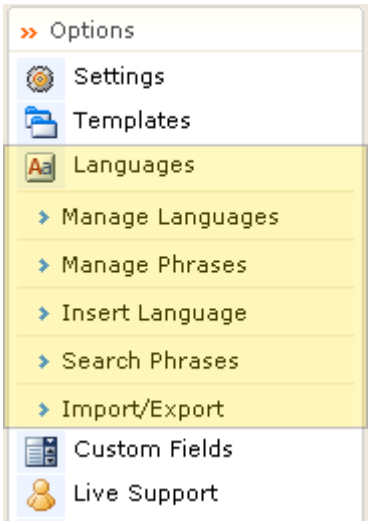
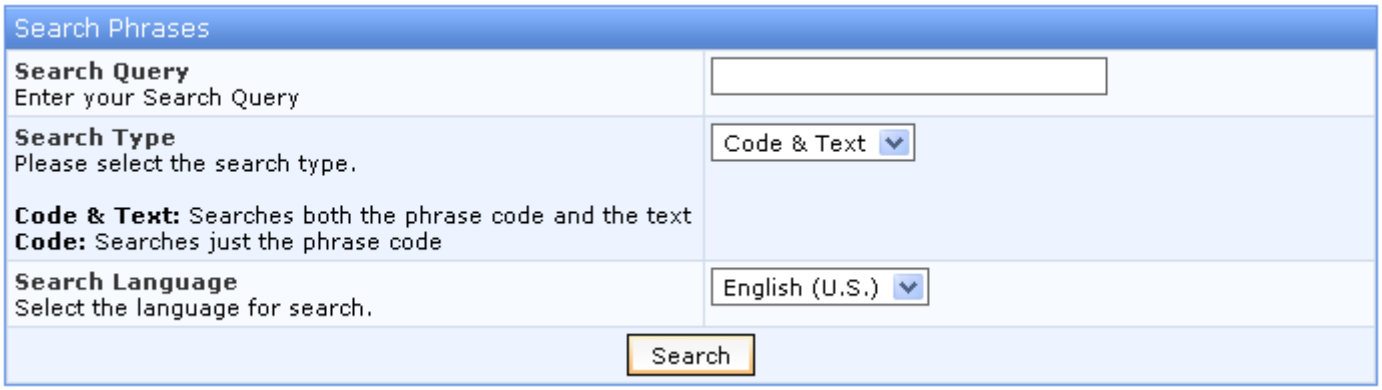


You will be presented with a search form, as shown below.



- **Search Query** – the terms that you want to search inside the phrases for.
- **Search Type** – if set to **code**, only the reference code (the name of the phrase) will be searched for. If set to **code and text**, both the phrase names and the phrase contents will be searched for.
- **Search Language** – select the language pack in which you want to perform the search.

Click on the **Search** button to perform the search. The search results will be returned in a fashion similar to the phrase listing seen in managing phrases within a language pack.

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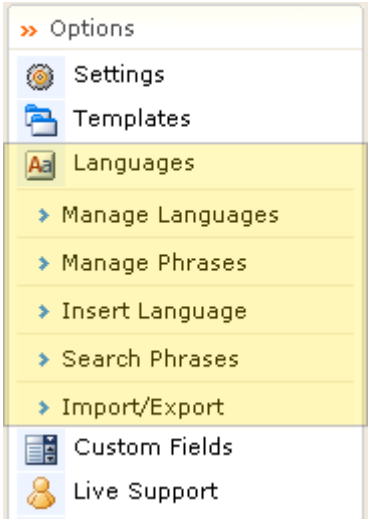
Importing and exporting languages

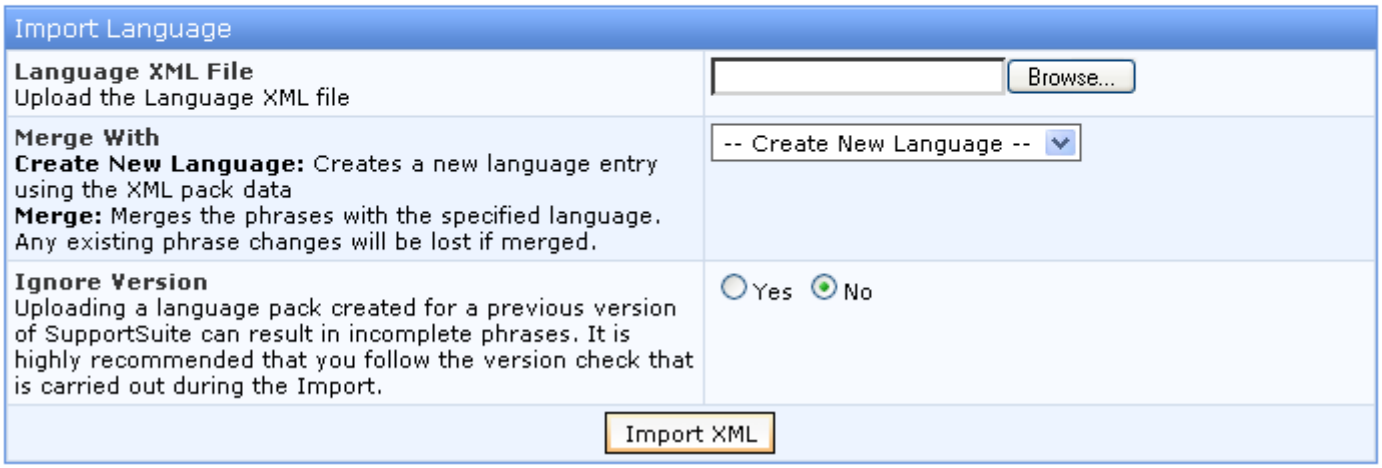
Language packs can be exported from the system (including all customized phrases) and imported, using XML files.

To import and export language pack files:

1. Click on **Import/Export** under the Languages menu, as shown below.



You will be presented with an **export** and an **import** option, as below.


Import Language
Language XML File
Upload the Language XML file
Browse...
Merge With
Create New Language: Creates a new language entry using the XML pack data
Merge: Merges the phrases with the specified language. Any existing phrase changes will be lost if merged.
-- Create New Language --
Ignore Version
Uploading a language pack created for a previous version of SupportSuite can result in incomplete phrases. It is highly recommended that you follow the version check that is carried out during the Import.
Yes
No
Import XML

To **export** a language, click on the **Export XML** button. You will then be asked to save an XML file. This is the language pack data file, containing all of the pack information and phrases. The language pack is also portable – you can export and share the language pack.

To **import** a language, click on the **browse** button (shown above) to select a language pack (XML format) from your local computer.

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Language packs can be merged with one another. To merge the importing language pack with another, select the language to merge to using the drop down menu. Please note that any existing phrase customizations (that exist in the language being merged to) will be lost, if the phrase definition also exists in the importing language pack.

If the langue pack was exported from a version of SupportSuite, eSupport or LiveResponse different to the one you are currently running, the system will return an error when you try to import the language pack **unless** you set this option to **Yes**. The system warns you in this way because sometimes language files change (phrases added or change) between versions.

Click on the **Import XML** button to complete the import.

You may also like to see how do I create a new language pack for the client support interface in the frequently asked questions.

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Custom fields

The custom fields features of the system comes heavily integrated into many aspects of SupportSuite, eSupport and LiveResponse.

Custom fields can be created to take in data at any of the following modules and stages:

- Creating a ticket.
- New user registration.
- Any of the team work modules (task list, calendar and appointments, contacts).
- Ticket billing and time tracking.

Custom fields are sorted into **groups**, which act very much like categories. When creating a group, you must specify for where the custom fields are intended (such as at user registration, ticket creation and so on). After creating the group, custom fields can then be added to the group.

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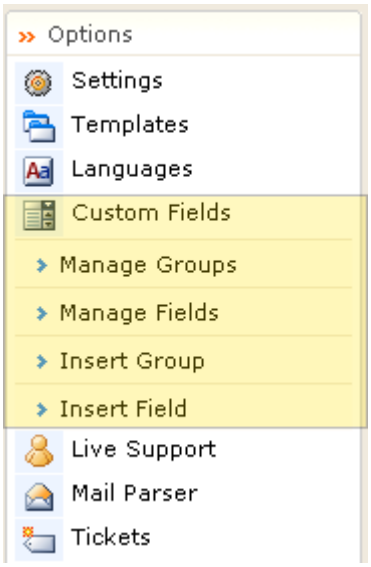
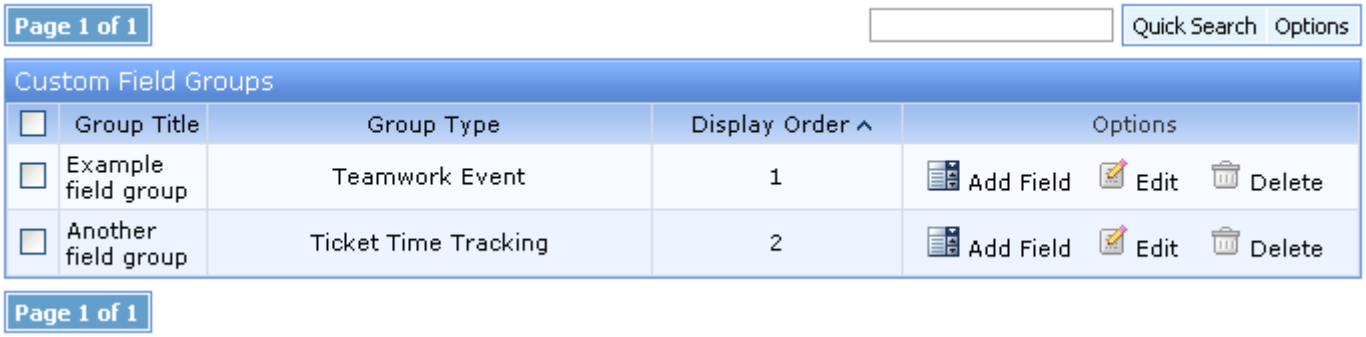
Managing custom field groups

To view and manage custom field groups:

1. Click on **Manage Groups** under the Custom Fields menu, as shown below.



You will be presented with a list of all the custom field groups present within the system, as shown below.



To **delete** a group, click on the respective delete icon.

To **add a field** to a group, click on the respective add field icon (see managing custom fields).

Selecting multiple groups (by checking the corresponding check boxes, as shown below) will open the mass-management menu, as shown below. Using this menu, groups can be mass-deleted. Under the **Advanced Search** tab, groups can be searched for by group title. Under the **Settings** tab, the number of groups shown per page (if there are many) can be limited.

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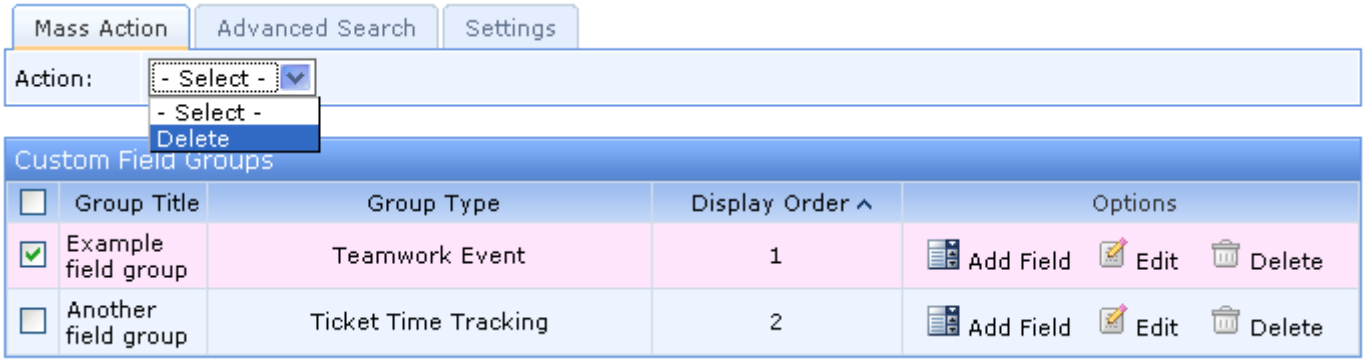


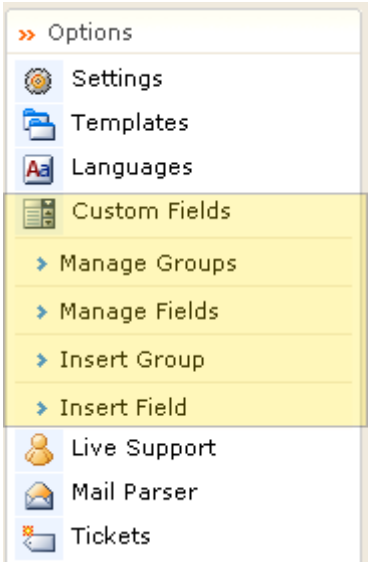
To **edit** a field group, click on the respective edit icon. You will be presented with the editable fields for this group, as shown below.

Refer to custom field group fields for documentation on the required fields for editing a custom field group.

Creating a new custom field group

To view and manage custom field groups:

1. Click on **Insert Group** under the Custom Fields menu, as shown below.



You will be presented with the editable fields for this group, as shown below. Refer to custom field group fields for documentation on the required fields for creating a new custom field group.

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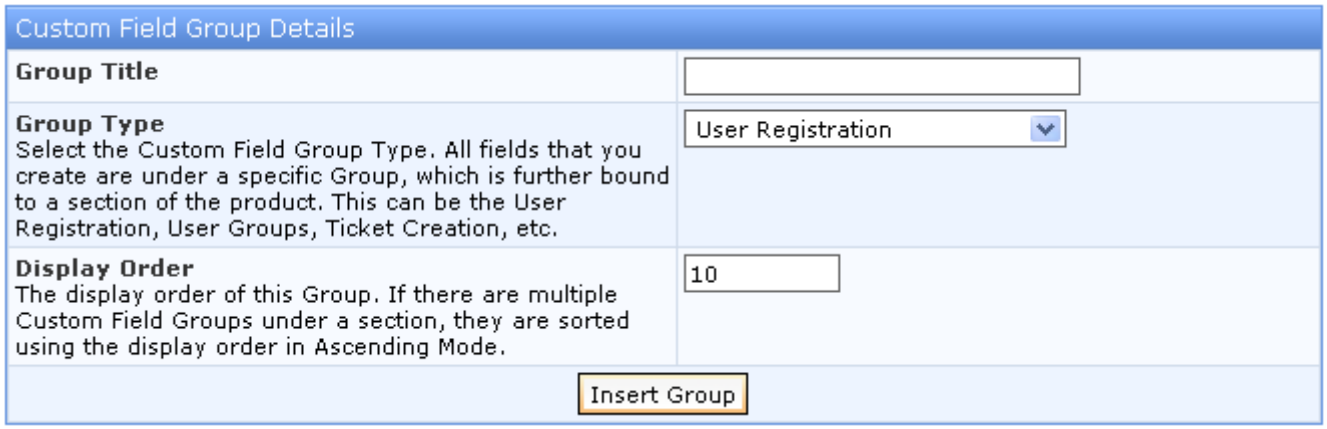
Custom field group fields


Custom Field Group Details
Group Title
Group Type
Select the Custom Field Group Type. All fields that you create are under a specific Group, which is further bound to a section of the product. This can be the User Registration, User Groups, Ticket Creation, etc.
User Registration
Display Order
The display order of this Group. If there are multiple Custom Field Groups under a section, they are sorted using the display order in Ascending Mode.
10
Insert Group

- **Group Title** – the title of thus custom field group.
- **Group Type** – the type of the custom field group. The type represents for which area of SupportSuite, eSupport and LiveResponse the custom field group is intended.
    - **User registration** – the fields apply to a user's account.
    - **User groups** – the fields apply to user groups.
    - **Teamwork contact** – the fields apply to a contact entry.
    - **Teamwork event** – the fields apply to an event entry (appointment in the calendar).
    - **Teamwork task** – the fields apply to a task entry.

The following ticket related group types introduce a new field that allows you to select for which department the custom fields are applicable to.

- **Staff ticket creation** – the fields apply to staff ticket creation within the staff control panel.
- **User ticket creation** – the fields apply to client ticket creation within the client support interface.
- **Staff & User ticket creation** – the fields apply to both client and staff creation.

- **Display Order** – the display order of the group. If you have more than one custom field group that applies to the same **Group Type**, the order that the field groupings are listed in will go by this display order value.

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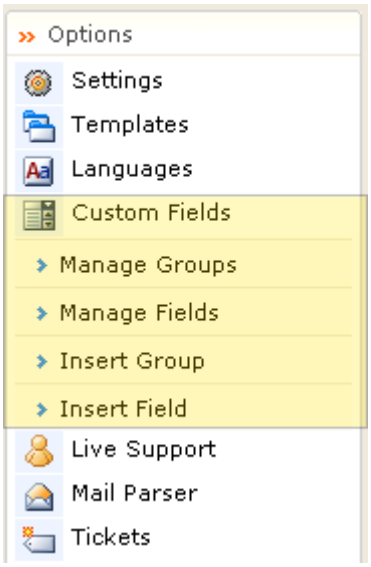
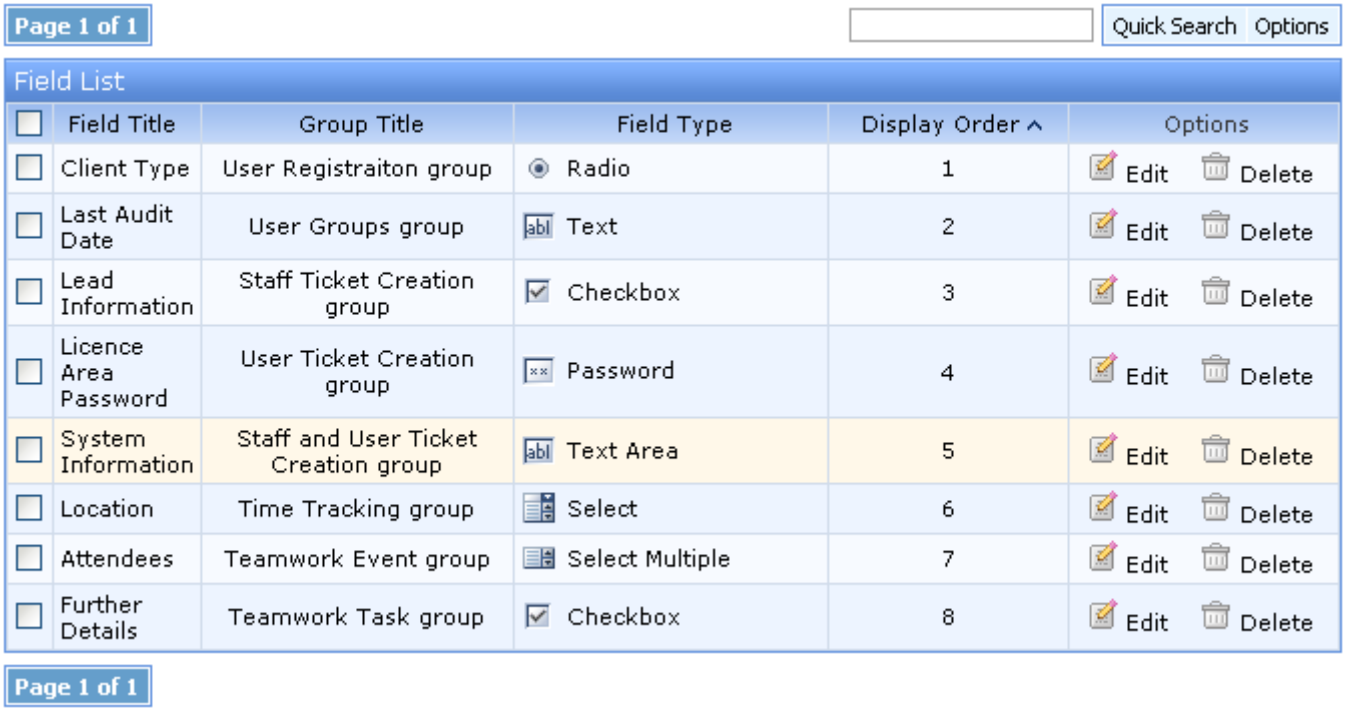
Managing custom fields

To view and manage custom field groups:

1. Click on **Manage Fields** under the Custom Fields menu, as shown below.



You will be presented with a list of all custom fields in the system across all custom field groups, as shown below.



To **delete** a field, click on the respective delete icon.

Selecting multiple fields (by checking the corresponding check boxes, as shown below) will open the mass-management menu, as shown below. Using this menu, fields can be mass-deleted

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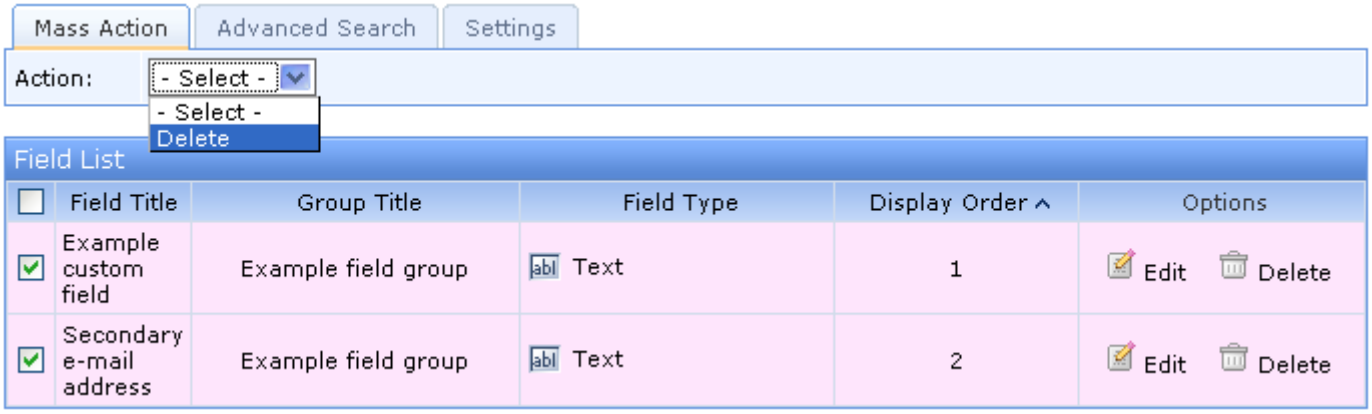
Under the **Advanced Search** tab, groups can be searched for by field title and field title. Under the **Settings** tab, the number of fields shown per page (if there are many) can be limited.



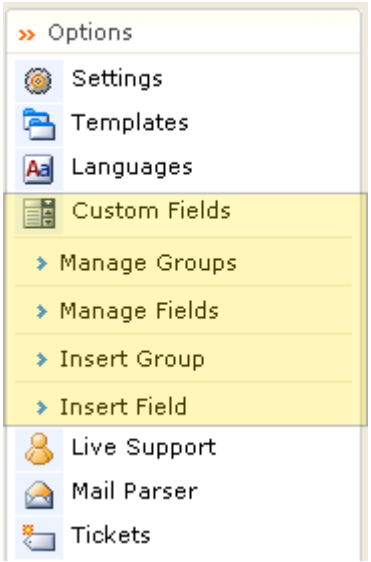
To **edit** a field, click on the respective edit icon. You will be presented with the editable fields for this field.

Refer to custom field types for documentation about the settings and properties for the different field types.

Creating a new custom field

To view and manage custom field groups:

1. Click on **Insert Field** under the Custom Fields menu, as shown below.



You will be presented with a series of field type options, as shown below.

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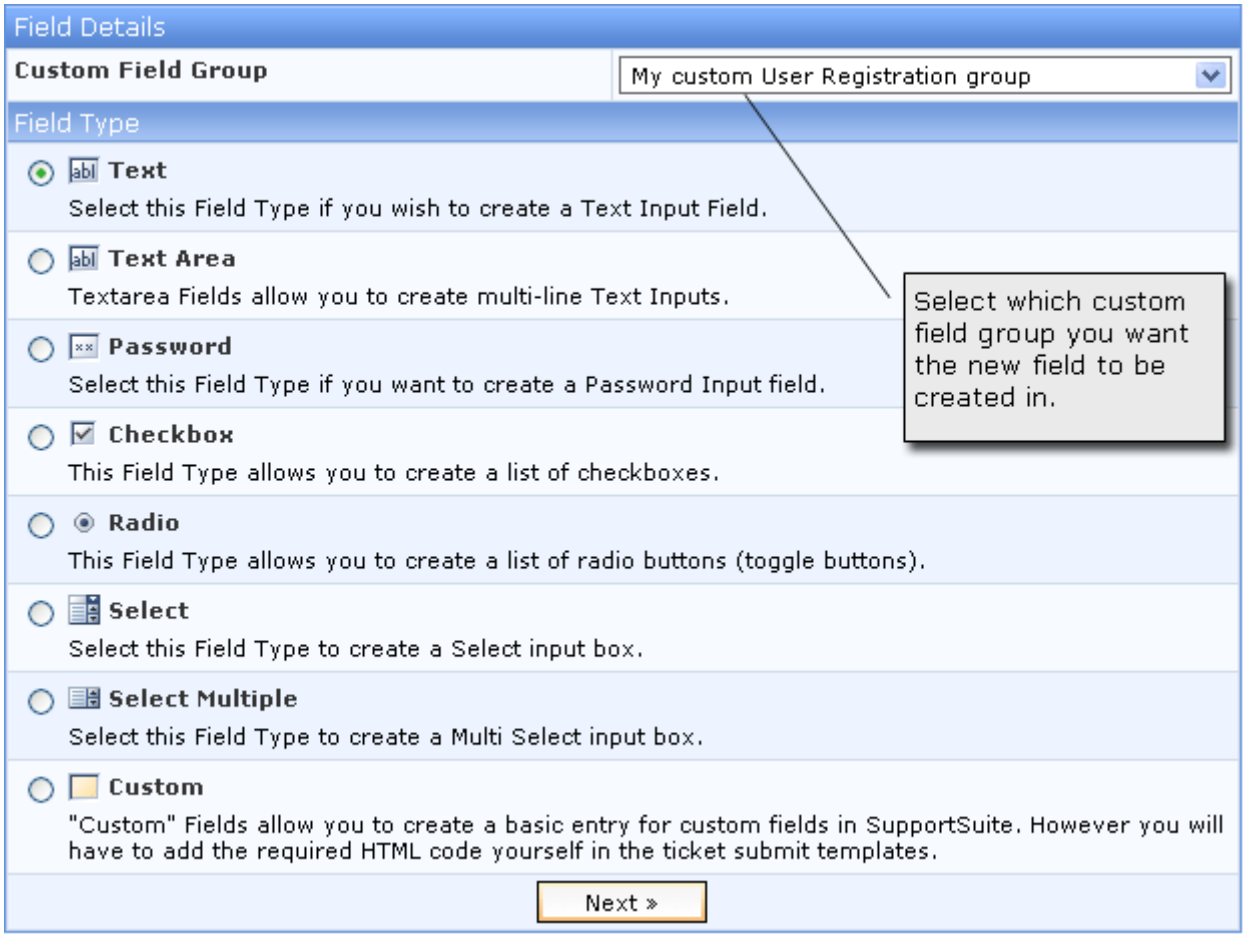
Field Details
Custom Field Group
My custom User Registration group
Field Type
Text
Select this Field Type if you wish to create a Text Input Field.
Text Area
Textarea Fields allow you to create multi-line Text Inputs.
Password
Select this Field Type if you want to create a Password Input field.
Checkbox
This Field Type allows you to create a list of checkboxes.
Radio
This Field Type allows you to create a list of radio buttons (toggle buttons).
Select
Select this Field Type to create a Select input box.
Select Multiple
Select this Field Type to create a Multi Select input box.
Custom
"Custom" Fields allow you to create a basic entry for custom fields in SupportSuite. However you will have to add the required HTML code yourself in the ticket submit templates.
Next »
Select which custom field group you want the new field to be created in.

Refer to custom field types for documentation about the settings and properties for the different field types.

Custom field types

Text field

A text field features a simple, single-line text field into which text can be typed, as shown below.

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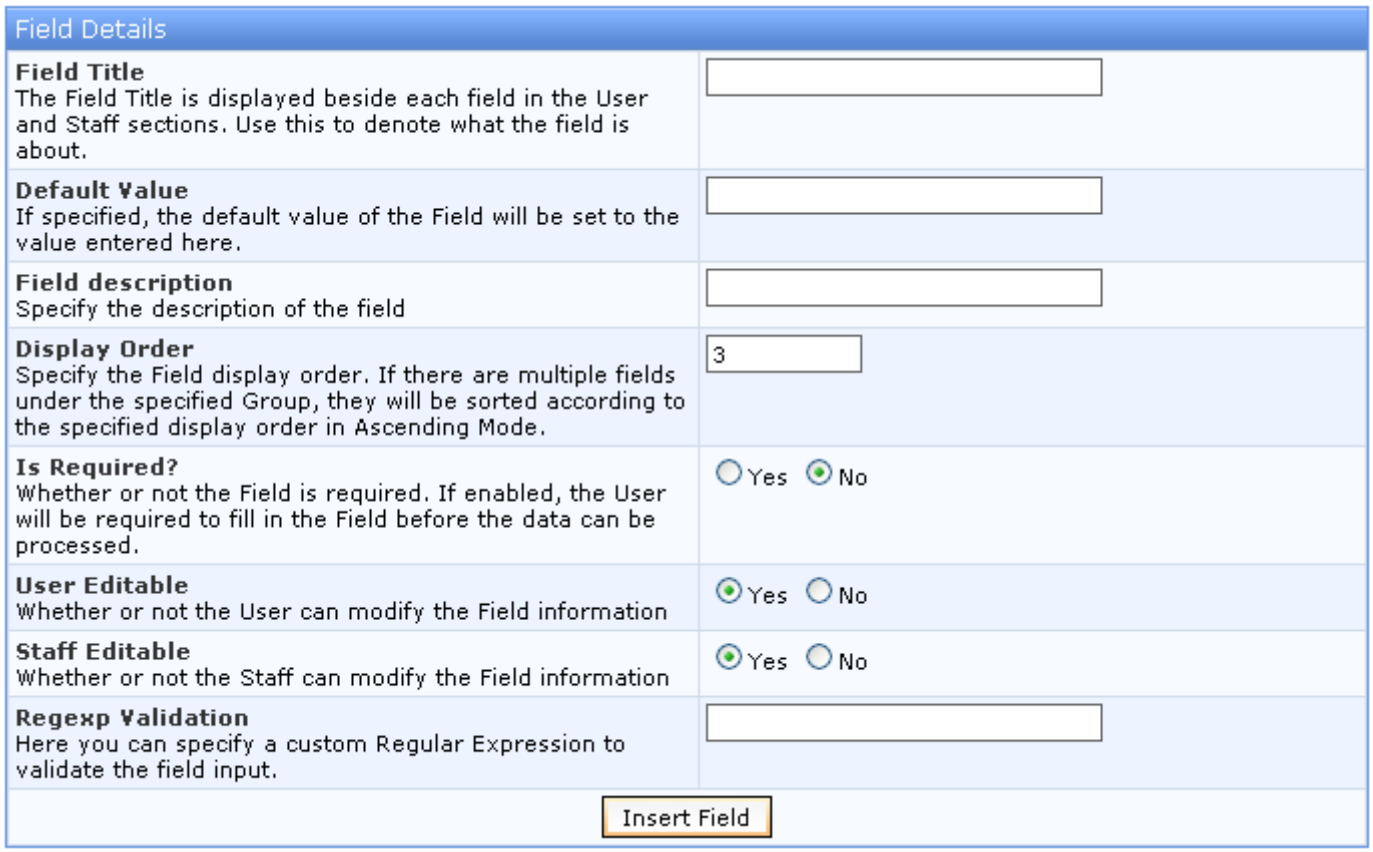
Field Details
Field Title
The Field Title is displayed beside each field in the User and Staff sections. Use this to denote what the field is about.
Default Value
If specified, the default value of the Field will be set to the value entered here.
Field description
Specify the description of the field
Display Order
Specify the Field display order. If there are multiple fields under the specified Group, they will be sorted according to the specified display order in Ascending Mode.
3
Is Required?
Whether or not the Field is required. If enabled, the User will be required to fill in the Field before the data can be processed.
Yes
No
User Editable
Whether or not the User can modify the Field information
Yes
No
Staff Editable
Whether or not the Staff can modify the Field information
Yes
No
Regexp Validation
Here you can specify a custom Regular Expression to validate the field input.
Insert Field

- **Field Title** – the main title of the field.
- **Default Value** – when the field is outputted into an interface, the default value will already be present in the field (unless changed).
- **Field description** – a description of the field, designed to be more descriptive and longer than the *Field Title*.
- **Display Order** – where more than one field is displayed as part of a group of fields, they are listed according to their display order (set here).
- **Is Required?** – if enabled, the system will return an error if the field is submitted a blank (when in use in an interface).
- **User Editable** – if enabled, the user will be able to modify the field (applies only to user registration and user ticket creation group types).
- **Staff Editable** – if enabled, any staff user will be able to modify the field regardless of whether it is a user field or a field intended for staff control panel use (such a **task list** field).
- **Regexp Validation** – although not required, a regular expression string can be entered here. When the field is outputted into an interface (such as at ticket creation), any data entered into this field will be validated against this expression. If validation fails, the system will return an error stating that the data entered is not valid. For more information on regular expressions, see www.php.net/preg_match.

Text area

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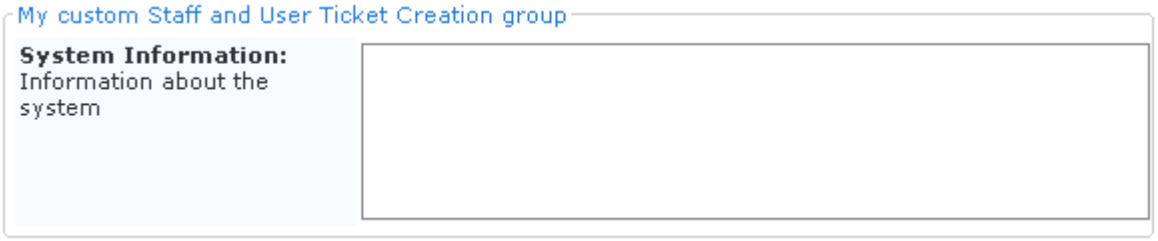
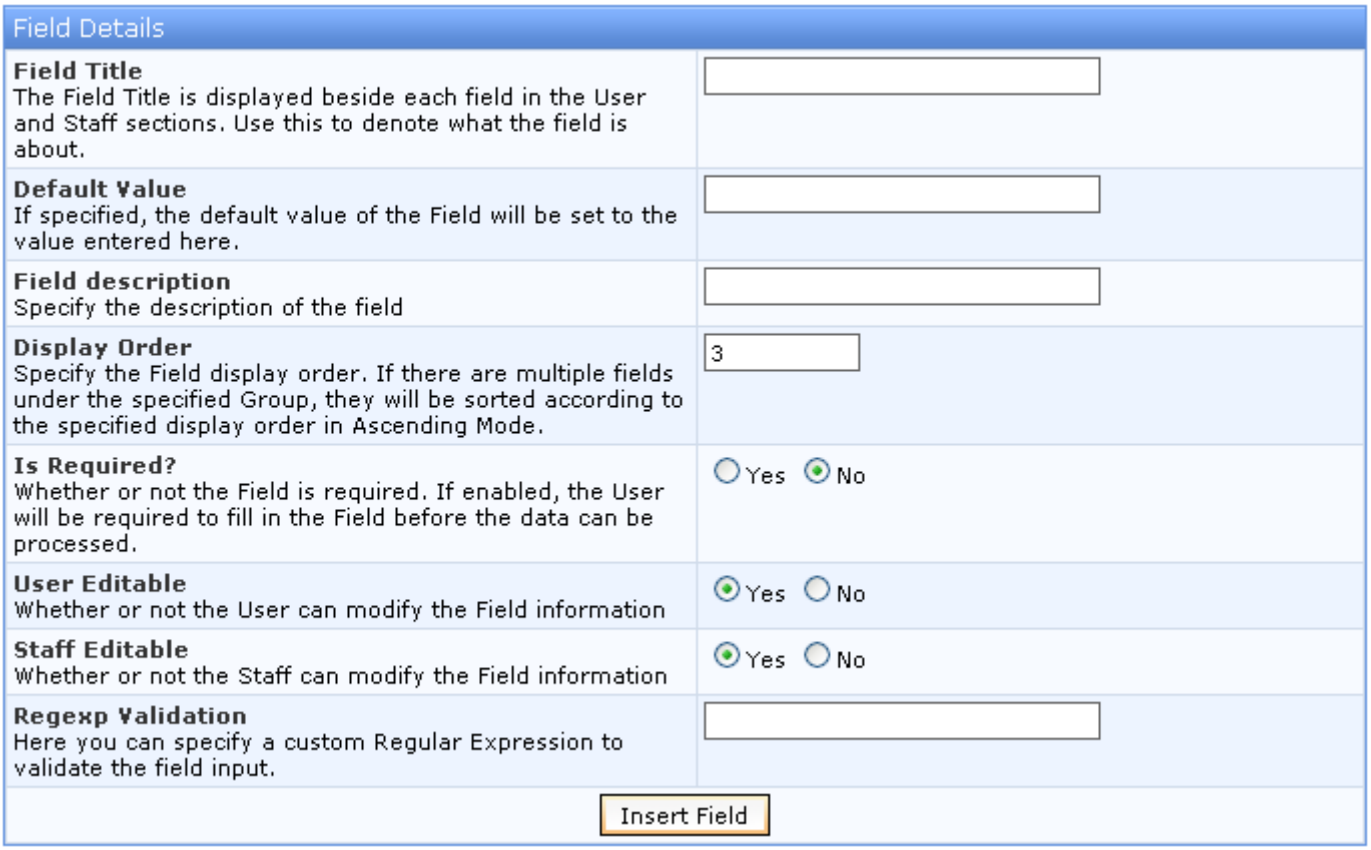
A text field features a multiple-line text field into which text can be typed. This field is intended for longer items of text.




Field Details
Field Title
The Field Title is displayed beside each field in the User and Staff sections. Use this to denote what the field is about.
Default Value
If specified, the default value of the Field will be set to the value entered here.
Field description
Specify the description of the field
Display Order
Specify the Field display order. If there are multiple fields under the specified Group, they will be sorted according to the specified display order in Ascending Mode.
3
Is Required?
Whether or not the Field is required. If enabled, the User will be required to fill in the Field before the data can be processed.
Yes
No
User Editable
Whether or not the User can modify the Field information
Yes
No
Staff Editable
Whether or not the Staff can modify the Field information
Yes
No
Regexp Validation
Here you can specify a custom Regular Expression to validate the field input.
Insert Field

- **Field Title** – the main title of the field.
- **Default Value** – when the field is outputted into an interface, the default value will already be present in the field (unless changed).
- **Field description** – a description of the field, designed to be more descriptive and longer than the *Field Title*.
- **Display Order** – where more than one field is displayed as part of a group of fields, they are listed according to their display order (set here).
- **Is Required?** – if enabled, the system will return an error if the field is submitted a blank (when in use in an interface).
- **User Editable** – if enabled, the user will be able to modify the field (applies only to user registration and user ticket creation group types).

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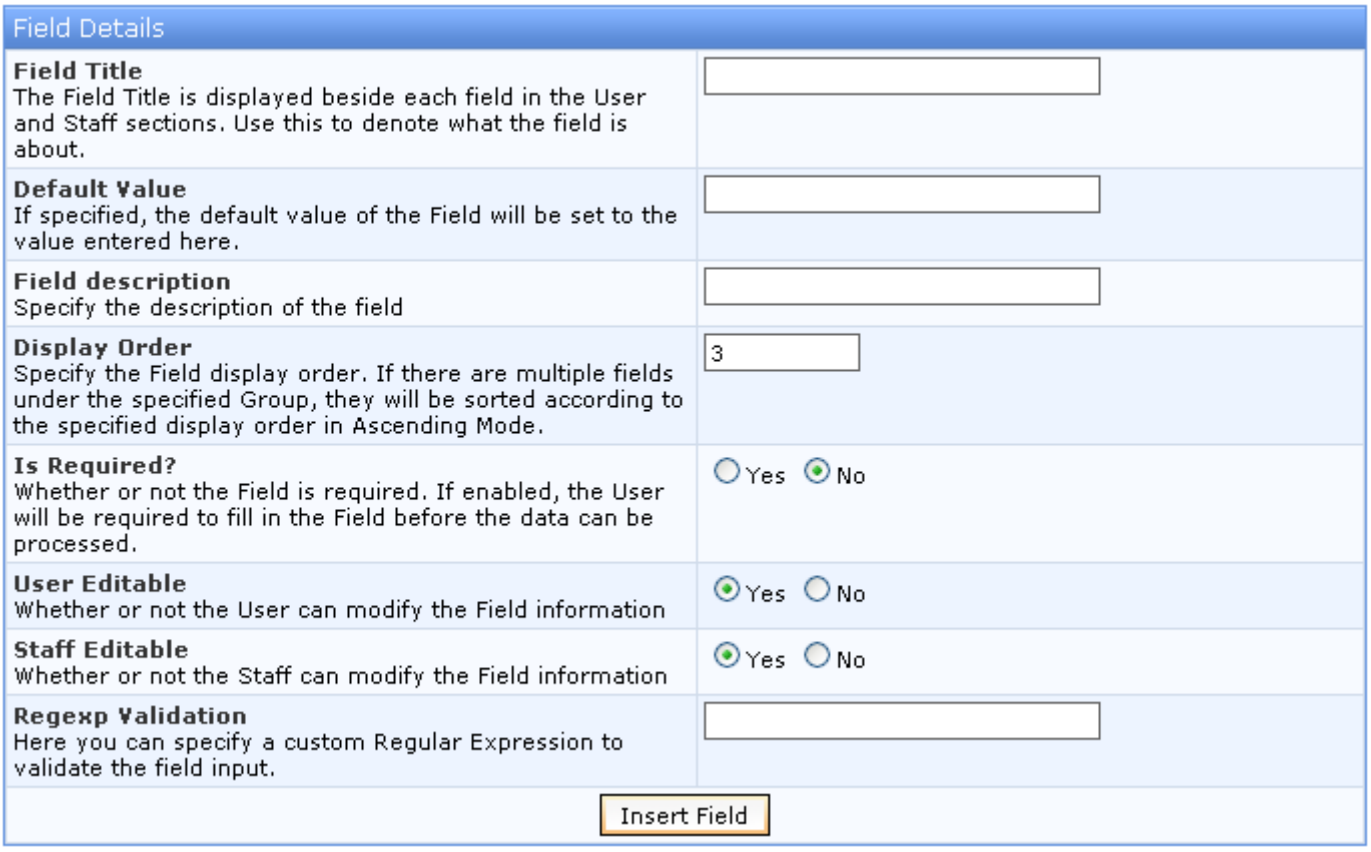
- **Staff Editable** – if enabled, any staff user will be able to modify the field regardless of whether it is a user field or a field intended for staff control panel use (such a **task list** field).

- **Regexp Validation** – although not required, a regular expression string can be entered here. When the field is outputted into an interface (such as at ticket creation), any data entered into this field will be validated against this expression. If validation fails, the system will return an error stating that the data entered is not valid. For more information on regular expressions, see www.php.net/preg_match.

Password field

The password field is in essence the same as a standard text field, with the exception that when text is typed into the field it is **masked**.


Field Details
Field Title
The Field Title is displayed beside each field in the User and Staff sections. Use this to denote what the field is about.
Default Value
If specified, the default value of the Field will be set to the value entered here.
Field description
Specify the description of the field
Display Order
Specify the Field display order. If there are multiple fields under the specified Group, they will be sorted according to the specified display order in Ascending Mode.
3
Is Required?
Whether or not the Field is required. If enabled, the User will be required to fill in the Field before the data can be processed.
Yes
No
User Editable
Whether or not the User can modify the Field information
Yes
No
Staff Editable
Whether or not the Staff can modify the Field information
Yes
No
Regexp Validation
Here you can specify a custom Regular Expression to validate the field input.
Insert Field

- **Field Title** – the main title of the field.

- **Default Value** – when the field is outputted into an interface, the default value will already be present in the field (unless changed).

- **Field description** – a description of the field, designed to be more descriptive and longer than the *Field Title*.

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- **Display Order** – where more than one field is displayed as part of a group of fields, they are listed according to their display order (set here).
- **Is Required?** – if enabled, the system will return an error if the field is submitted a blank (when in use in an interface).
- **User Editable** – if enabled, the user will be able to modify the field (applies only to user registration and user ticket creation group types).
- **Staff Editable** – if enabled, any staff user will be able to modify the field regardless of whether it is a user field or a field intended for staff control panel use (such a **task list** field).
- **Regexp Validation** – although not required, a regular expression string can be entered here. When the field is outputted into an interface (such as at ticket creation), any data entered into this field will be validated against this expression. If validation fails, the system will return an error stating that the data entered is not valid. For more information on regular expressions, see www.php.net/preg_match.

Checkbox list

A checkbox list is made up of a series of options, each with a checkbox. To select an option, the user "checks" (ticks) the box. The user is able to select **more than one** field.

My custom Staff Ticket Creation group
Lead Information
Further details about the ticket being sent out.
Has been contacted before
Passed on by word-of-mouth
Found by cold-calling
Found through agents
Represents large company

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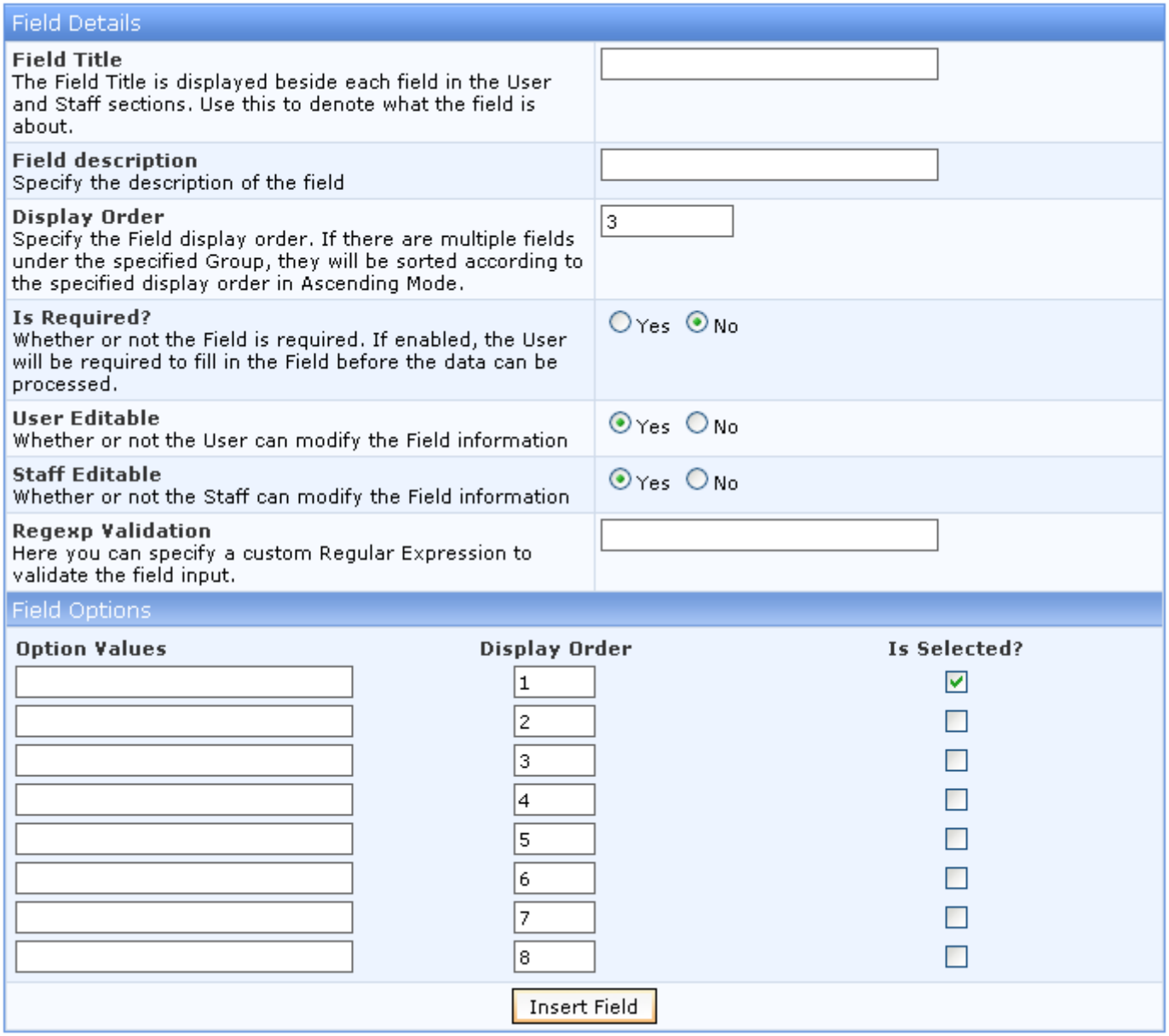
Field Details
Field Title
The Field Title is displayed beside each field in the User and Staff sections. Use this to denote what the field is about.
Field description
Specify the description of the field
Display Order
Specify the Field display order. If there are multiple fields under the specified Group, they will be sorted according to the specified display order in Ascending Mode.
3
Is Required?
Whether or not the Field is required. If enabled, the User will be required to fill in the Field before the data can be processed.
Yes
No
User Editable
Whether or not the User can modify the Field information
Yes
No
Staff Editable
Whether or not the Staff can modify the Field information
Yes
No
Regexp Validation
Here you can specify a custom Regular Expression to validate the field input.
Field Options
Option Values
Display Order
Is Selected?
1
2
3
4
5
6
7
8
Insert Field

- **Field Title** – the main title of the field.
- **Default Value** – when the field is outputted into an interface, the default value will already be present in the field (unless changed).
- **Field description** – a description of the field, designed to be more descriptive and longer than the *Field Title*.
- **Display Order** – where more than one field is displayed as part of a group of fields, they are listed according to their display order (set here).
- **Is Required?** – if enabled, the system will return an error if the field is submitted a blank (when in use in an interface).
- **User Editable** – if enabled, the user will be able to modify the field (applies only to user registration and user ticket creation group types).

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- **Staff Editable** – if enabled, any staff user will be able to modify the field regardless of whether it is a user field or a field intended for staff control panel use (such a **task list** field).
- **Regexp Validation** – although not required, a regular expression string can be entered here. When the field is outputted into an interface (such as at ticket creation), any data entered into this field will be validated against this expression. If validation fails, the system will return an error stating that the data entered is not valid. For more information on regular expressions, see www.php.net/preg_match.
- **Option Values** – enter the field selections here.

Radio button list

A radio button list is made up of a series of options, each with a box. To select an option, the user "marks" the box. The user is able to select **just one** field.

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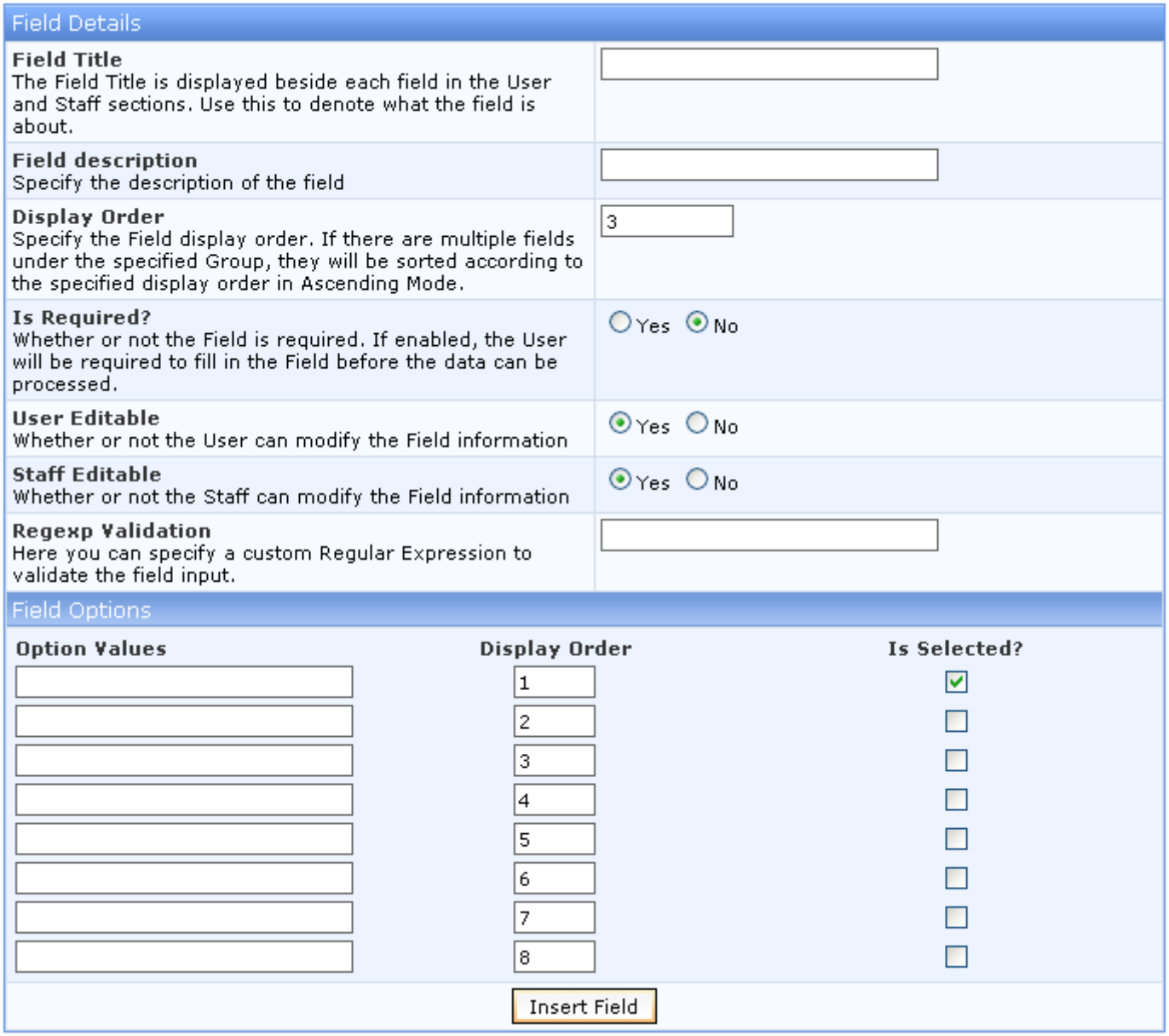
Field Details
Field Title
The Field Title is displayed beside each field in the User and Staff sections. Use this to denote what the field is about.
Field description
Specify the description of the field
Display Order
Specify the Field display order. If there are multiple fields under the specified Group, they will be sorted according to the specified display order in Ascending Mode.
3
Is Required?
Whether or not the Field is required. If enabled, the User will be required to fill in the Field before the data can be processed.
Yes
No
User Editable
Whether or not the User can modify the Field information
Yes
No
Staff Editable
Whether or not the Staff can modify the Field information
Yes
No
Regexp Validation
Here you can specify a custom Regular Expression to validate the field input.
Field Options
Option Values
Display Order
Is Selected?
1
2
3
4
5
6
7
8
Insert Field

- **Field Title** – the main title of the field.
- **Default Value** – when the field is outputted into an interface, the default value will already be present in the field (unless changed).
- **Field description** – a description of the field, designed to be more descriptive and longer than the *Field Title*.
- **Display Order** – where more than one field is displayed as part of a group of fields, they are listed according to their display order (set here).
- **Is Required?** – if enabled, the system will return an error if the field is submitted a blank (when in use in an interface).
- **User Editable** – if enabled, the user will be able to modify the field (applies only to user registration and user ticket creation group types).

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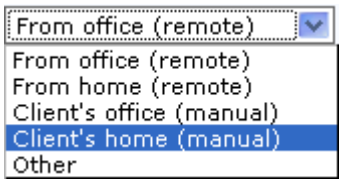
- **Staff Editable** – if enabled, any staff user will be able to modify the field regardless of whether it is a user field or a field intended for staff control panel use (such a **task list** field).

- **Regexp Validation** – although not required, a regular expression string can be entered here. When the field is outputted into an interface (such as at ticket creation), any data entered into this field will be validated against this expression. If validation fails, the system will return an error stating that the data entered is not valid. For more information on regular expressions, see www.php.net/preg_match.

- **Option Values** – enter the field selections here.

Selection field (drop-down menu)

A drop down is a form field intended for listing many options in one condensed area of page space. Clicking on the menu will expand a scrollable list of all field selections. The user is able to select **just one** selection.



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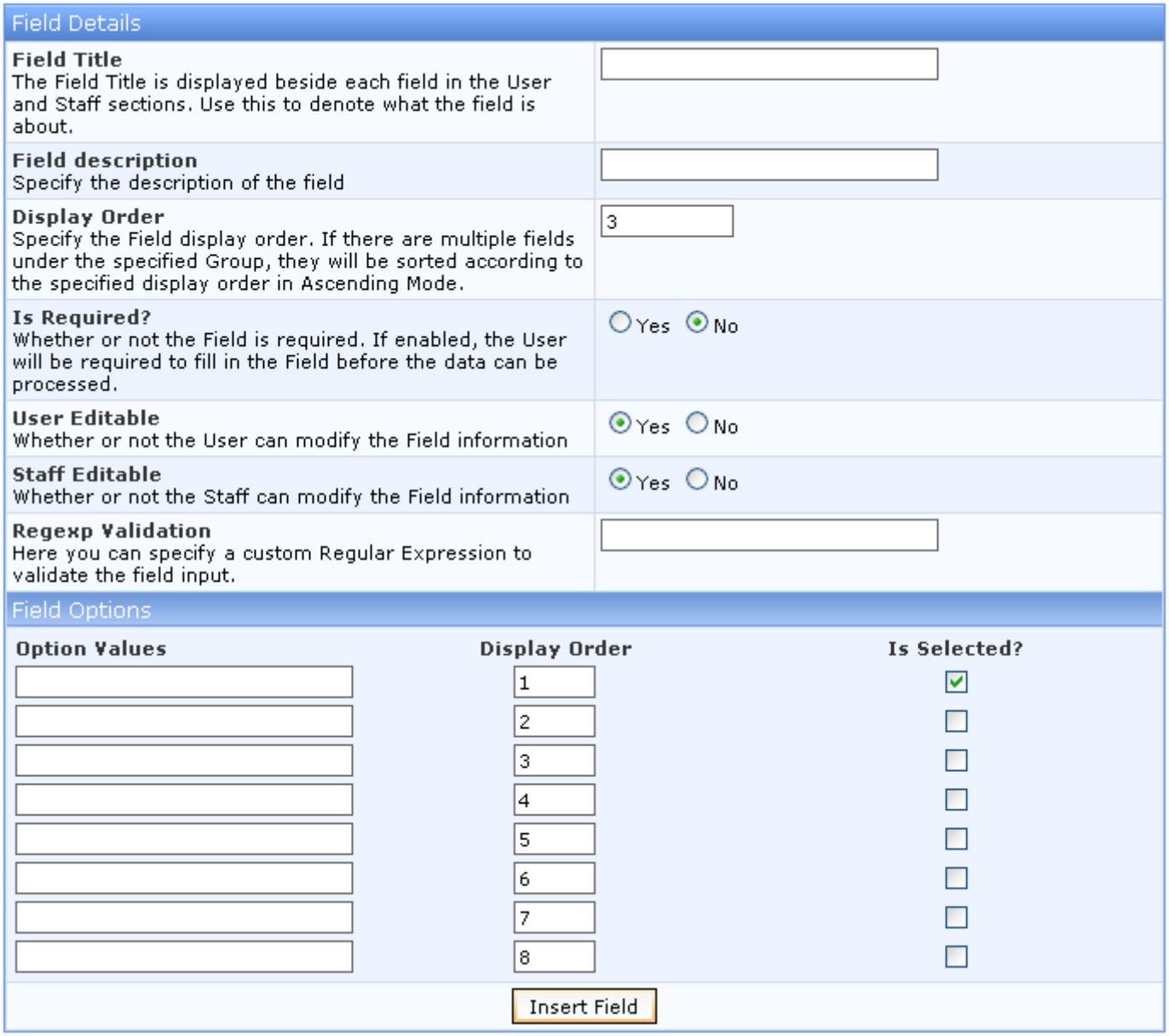
Field Details
Field Title
The Field Title is displayed beside each field in the User and Staff sections. Use this to denote what the field is about.
Field description
Specify the description of the field
Display Order
Specify the Field display order. If there are multiple fields under the specified Group, they will be sorted according to the specified display order in Ascending Mode.
3
Is Required?
Whether or not the Field is required. If enabled, the User will be required to fill in the Field before the data can be processed.
Yes
No
User Editable
Whether or not the User can modify the Field information
Yes
No
Staff Editable
Whether or not the Staff can modify the Field information
Yes
No
Regexp Validation
Here you can specify a custom Regular Expression to validate the field input.
Field Options
Option Values
Display Order
Is Selected?
1
2
3
4
5
6
7
8
Insert Field

- **Field Title** – the main title of the field.
- **Default Value** – when the field is outputted into an interface, the default value will already be present in the field (unless changed).
- **Field description** – a description of the field, designed to be more descriptive and longer than the *Field Title*.
- **Display Order** – where more than one field is displayed as part of a group of fields, they are listed according to their display order (set here).
- **Is Required?** – if enabled, the system will return an error if the field is submitted a blank (when in use in an interface).
- **User Editable** – if enabled, the user will be able to modify the field (applies only to user registration and user ticket creation group types).

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- **Staff Editable** – if enabled, any staff user will be able to modify the field regardless of whether it is a user field or a field intended for staff control panel use (such a **task list** field).

- **Regexp Validation** – although not required, a regular expression string can be entered here. When the field is outputted into an interface (such as at ticket creation), any data entered into this field will be validated against this expression. If validation fails, the system will return an error stating that the data entered is not valid. For more information on regular expressions, see www.php.net/preg_match.

- **Option Values** – enter the field selections here.

Multiple selection field (drop-down menu)

A drop down is a form field intended for listing many options in one condensed area of page space. Clicking on the menu will expand a scrollable list of all field selections. The user is able to select **more than one** selection by dragging and selecting with the mouse cursor, or selecting items whilst holding the CTRL key.

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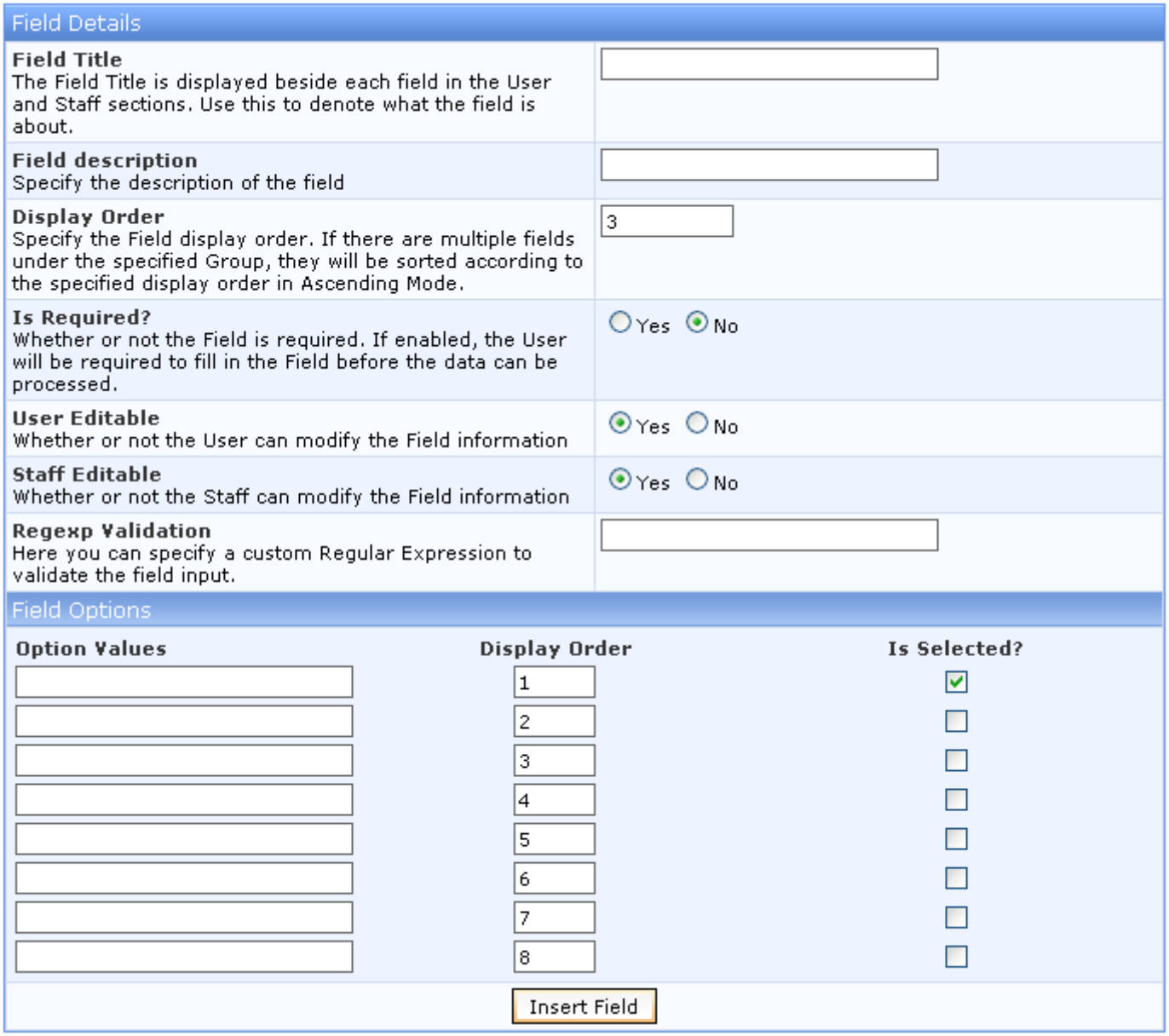
Field Details
Field Title
The Field Title is displayed beside each field in the User and Staff sections. Use this to denote what the field is about.
Field description
Specify the description of the field
Display Order
Specify the Field display order. If there are multiple fields under the specified Group, they will be sorted according to the specified display order in Ascending Mode.
3
Is Required?
Whether or not the Field is required. If enabled, the User will be required to fill in the Field before the data can be processed.
Yes
No
User Editable
Whether or not the User can modify the Field information
Yes
No
Staff Editable
Whether or not the Staff can modify the Field information
Yes
No
Regexp Validation
Here you can specify a custom Regular Expression to validate the field input.
Field Options
Option Values
Display Order
Is Selected?
1
2
3
4
5
6
7
8
Insert Field

- **Field Title** – the main title of the field.
- **Default Value** – when the field is outputted into an interface, the default value will already be present in the field (unless changed).
- **Field description** – a description of the field, designed to be more descriptive and longer than the *Field Title*.
- **Display Order** – where more than one field is displayed as part of a group of fields, they are listed according to their display order (set here).
- **Is Required?** – if enabled, the system will return an error if the field is submitted a blank (when in use in an interface).
- **User Editable** – if enabled, the user will be able to modify the field (applies only to user registration and user ticket creation group types).

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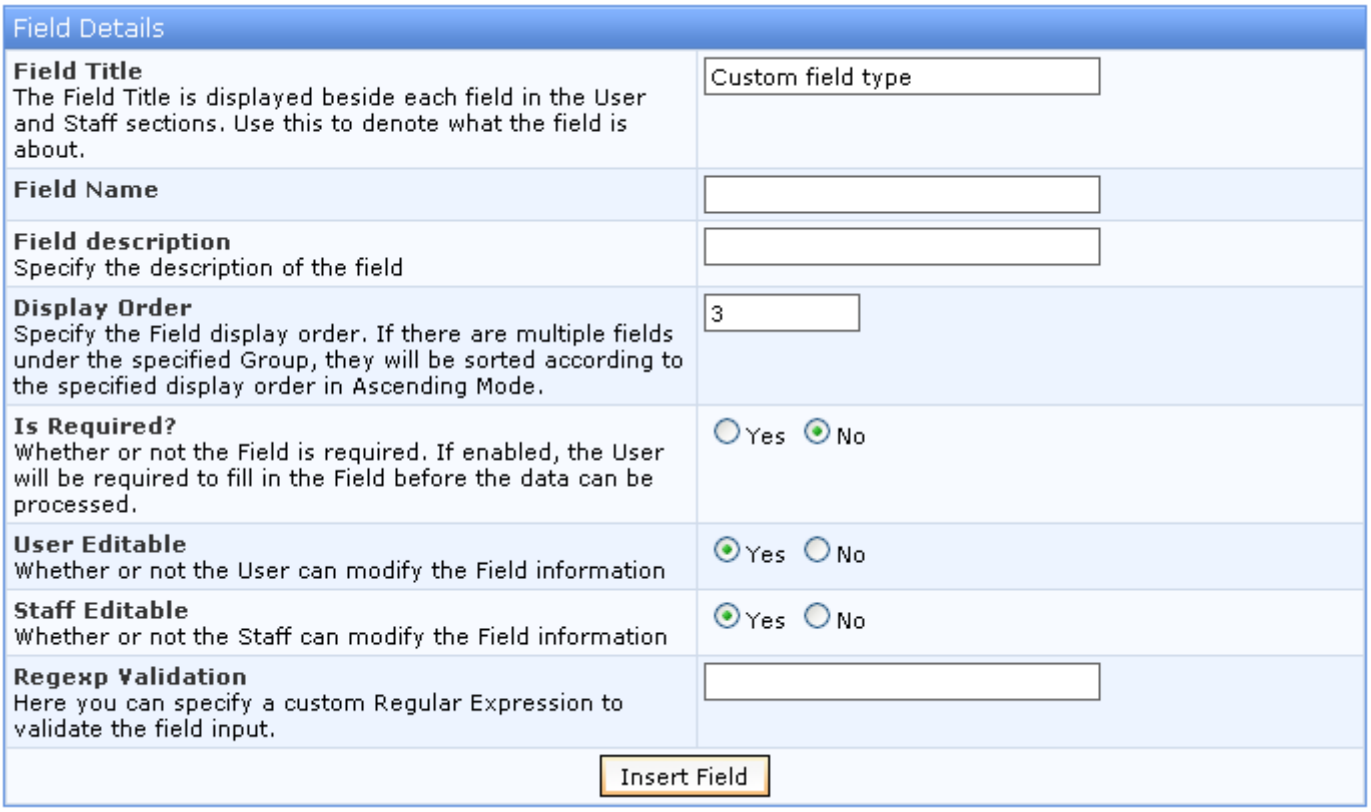
- **Staff Editable** – if enabled, any staff user will be able to modify the field regardless of whether it is a user field or a field intended for staff control panel use (such a **task list** field).
- **Regexp Validation** – although not required, a regular expression string can be entered here. When the field is outputted into an interface (such as at ticket creation), any data entered into this field will be validated against this expression. If validation fails, the system will return an error stating that the data entered is not valid. For more information on regular expressions, see www.php.net/preg_match.
- **Option Values** – enter the field selections here.

Custom field

The custom field type allows you to construct your own field area using HTML code. The HTML code you use must be created by yourself and inserted into a template by yourself – all the custom field type creates here, is a data entry point for data entered into this field. Once entered, the system takes over handling of the data and stores it in a database.

The data from this field is viewable within the staff control panel, as with any other field. The only difference is that the field is **not** automatically inserted into an interface.

When writing the HTML code for this custom field type, the **fieldname** you must use in the code should be the same as that specified, as shown below.


Field Details
Field Title
The Field Title is displayed beside each field in the User and Staff sections. Use this to denote what the field is about.
Custom field type
Field Name
Field description
Specify the description of the field
Display Order
Specify the Field display order. If there are multiple fields under the specified Group, they will be sorted according to the specified display order in Ascending Mode.
3
Is Required?
Whether or not the Field is required. If enabled, the User will be required to fill in the Field before the data can be processed.
Yes No
User Editable
Whether or not the User can modify the Field information
Yes No
Staff Editable
Whether or not the Staff can modify the Field information
Yes No
Regexp Validation
Here you can specify a custom Regular Expression to validate the field input.
Insert Field

- **Field Title** – the main title of the field.
- **Field Name** – the name of the field. This must be all one word, and when referencing the field name from HTML code (as described earlier) is case sensitive.

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- **Default Value** – when the field is outputted into an interface, the default value will already be present in the field (unless changed).
- **Field description** – a description of the field, designed to be more descriptive and longer than the *Field Title*.
- **Display Order** – where more than one field is displayed as part of a group of fields, they are listed according to their display order (set here).
- **Is Required?** – if enabled, the system will return an error if the field is submitted a blank (when in use in an interface).
- **User Editable** – if enabled, the user will be able to modify the field (applies only to user registration and user ticket creation group types).
- **Staff Editable** – if enabled, any staff user will be able to modify the field regardless of whether it is a user field or a field intended for staff control panel use (such a **task list** field).
- **Regexp Validation** – although not required, a regular expression string can be entered here. When the field is outputted into an interface (such as at ticket creation), any data entered into this field will be validated against this expression. If validation fails, the system will return an error stating that the data entered is not valid. For more information on regular expressions, see www.php.net/preg_match.

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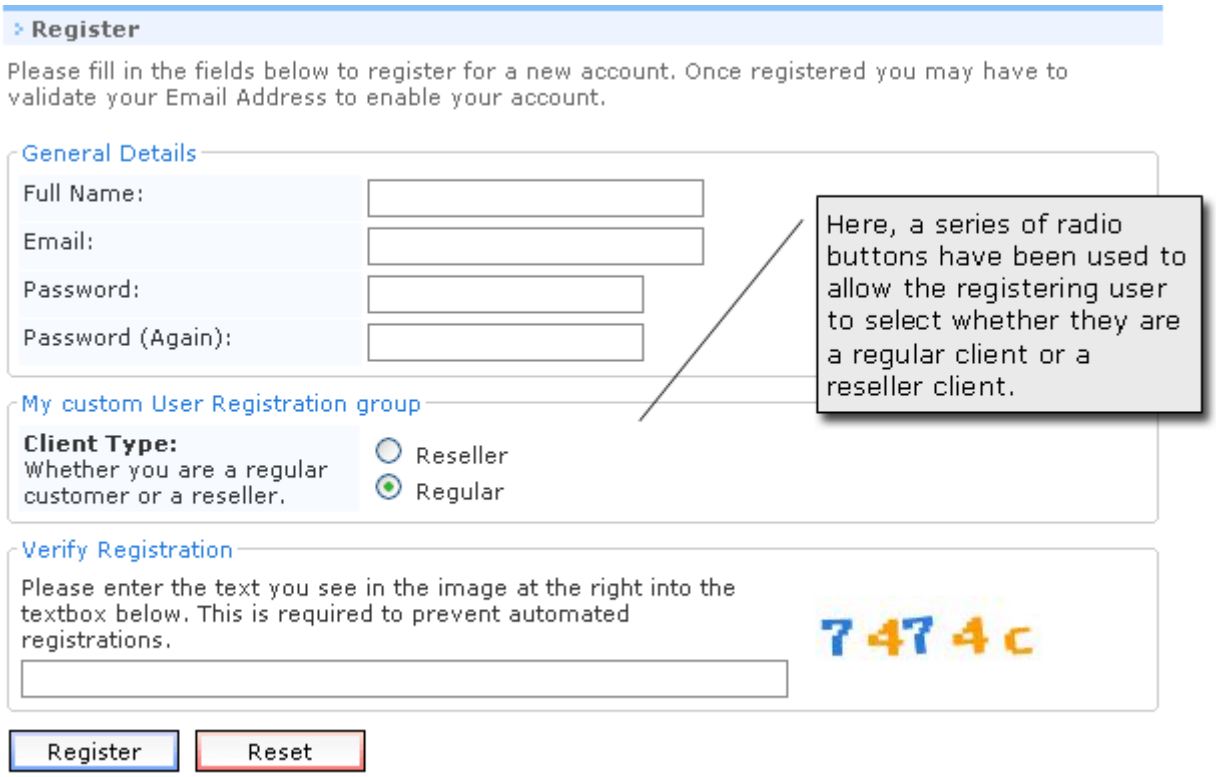
Custom field usage examples

This section details example uses of each **group type** of custom field (i.e. where the field is intended for – such as at user registration, or ticket creation).

At user registration


Register
Please fill in the fields below to register for a new account. Once registered you may have to validate your Email Address to enable your account.
General Details
Full Name:
Email:
Password:
Password (Again):
My custom User Registration group
Client Type:
Whether you are a regular customer or a reseller.
Reseller
Regular
Here, a series of radio buttons have been used to allow the registering user to select whether they are a regular client or a reseller client.
Verify Registration
Please enter the text you see in the image at the right into the textbox below. This is required to prevent automated registrations.
Register
Reset

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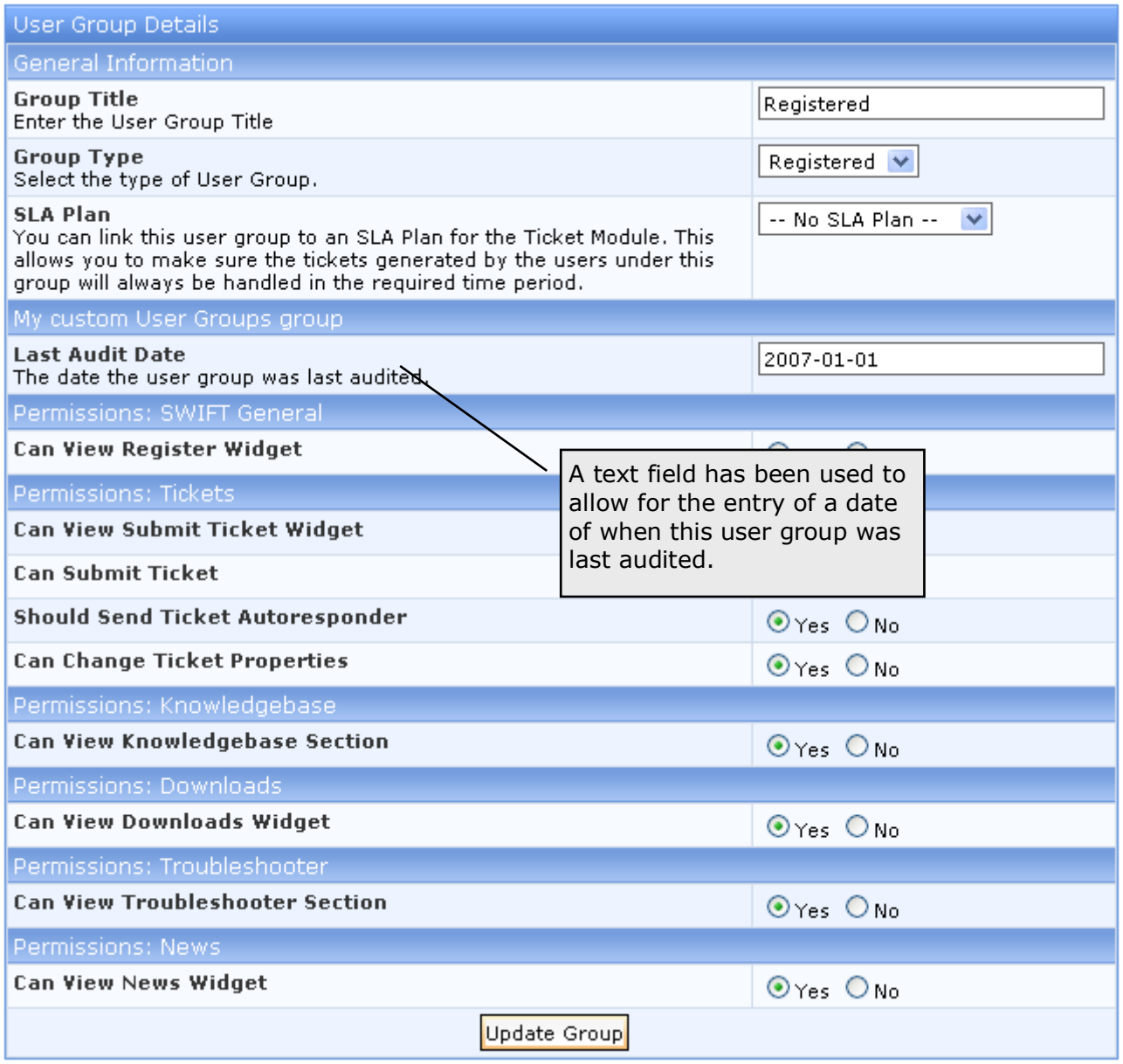
At user group management


User Group Details
General Information
Group Title
Enter the User Group Title
Registered
Group Type
Select the type of User Group.
Registered
SLA Plan
You can link this user group to an SLA Plan for the Ticket Module. This allows you to make sure the tickets generated by the users under this group will always be handled in the required time period.
-- No SLA Plan --
My custom User Groups group
Last Audit Date
The date the user group was last audited.
2007-01-01
Permissions: SWIFT General
Can View Register Widget
Permissions: Tickets
Can View Submit Ticket Widget
Can Submit Ticket
Should Send Ticket Autoresponder
Yes No
Can Change Ticket Properties
Yes No
Permissions: Knowledgebase
Can View Knowledgebase Section
Yes No
Permissions: Downloads
Can View Downloads Widget
Yes No
Permissions: Troubleshooter
Can View Troubleshooter Section
Yes No
Permissions: News
Can View News Widget
Yes No
Update Group
A text field has been used to allow for the entry of a date of when this user group was last audited.

The date field shown above is also **validated** using a **regular expression**, as shown below (taken from the managing custom fields area of the administrator control panel).

For more information on regular expressions, see www.php.net/preg_match.

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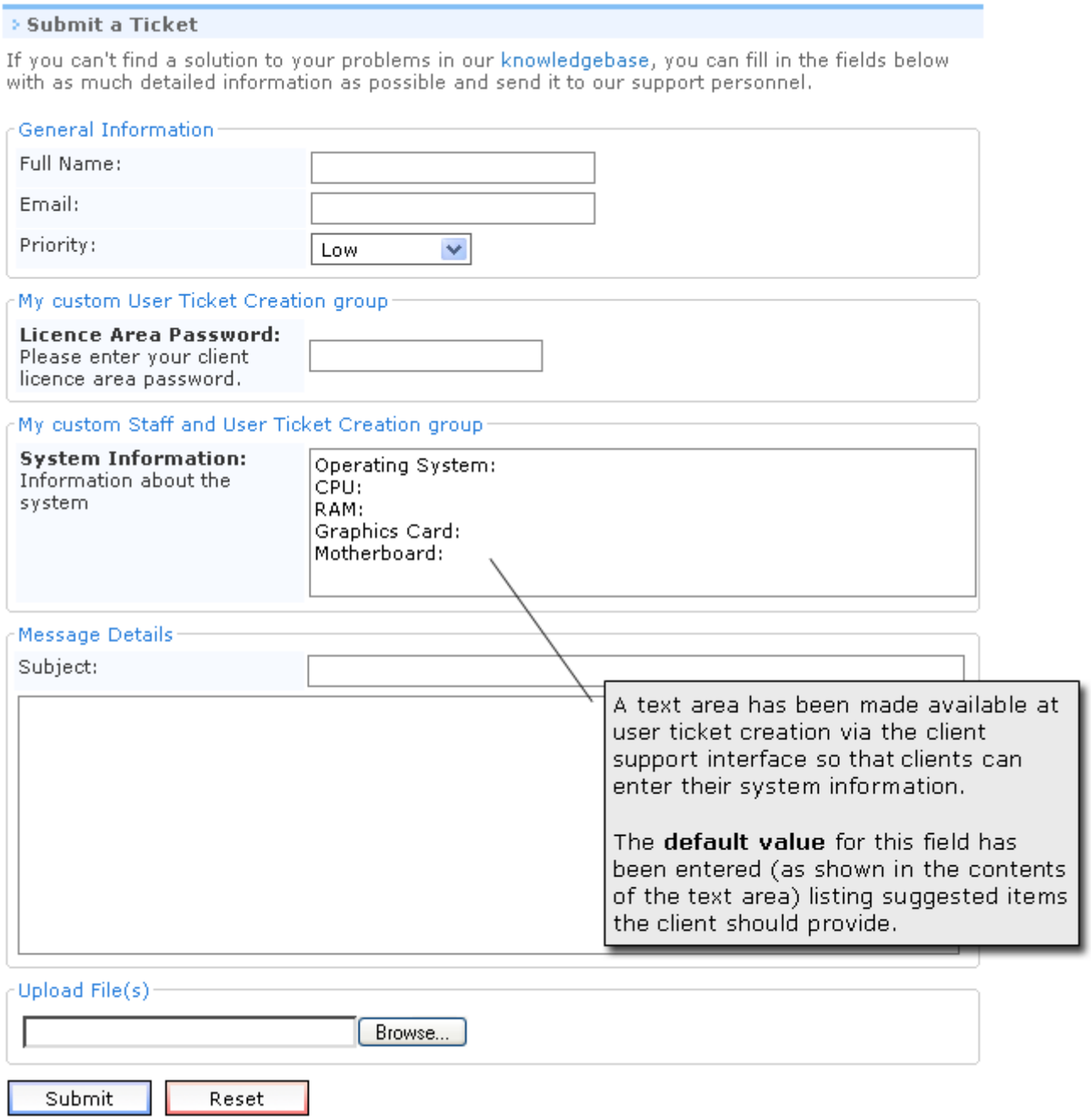
At user ticket creation in the client support interface


Submit a Ticket
If you can't find a solution to your problems in our knowledgebase, you can fill in the fields below with as much detailed information as possible and send it to our support personnel.
General Information
Full Name:
Email:
Priority:
Low
My custom User Ticket Creation group
Licence Area Password:
Please enter your client licence area password.
My custom Staff and User Ticket Creation group
System Information:
Information about the system
Operating System:
CPU:
RAM:
Graphics Card:
Motherboard:
Message Details
Subject:
A text area has been made available at user ticket creation via the client support interface so that clients can enter their system information.
The default value for this field has been entered (as shown in the contents of the text area) listing suggested items the client should provide.
Upload File(s)
Browse...
Submit
Reset

At staff ticket creation in the staff control panel

My custom Staff Ticket Creation group
Lead Information
Further details about the ticket being sent out.
Has been contacted before
Passed on by word-of-mouth
Found by cold-calling
Found through agents
Represents large company

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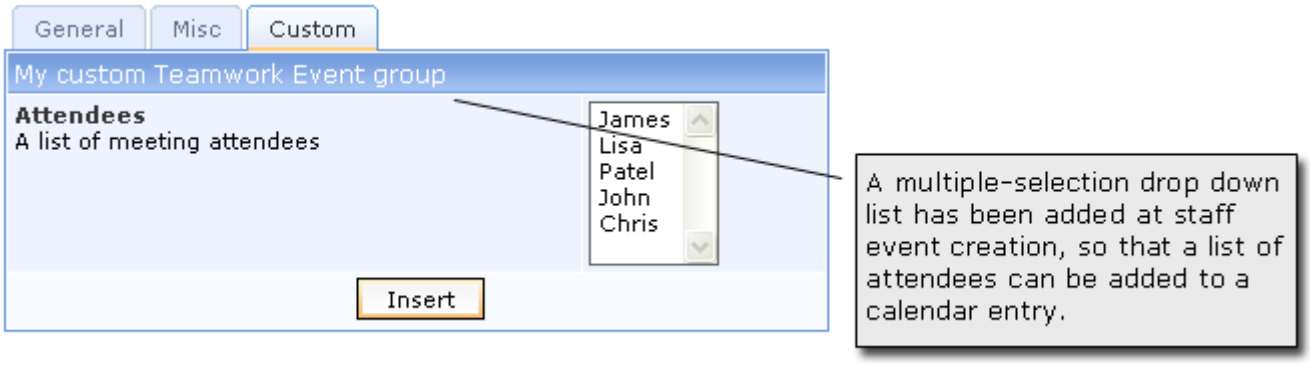
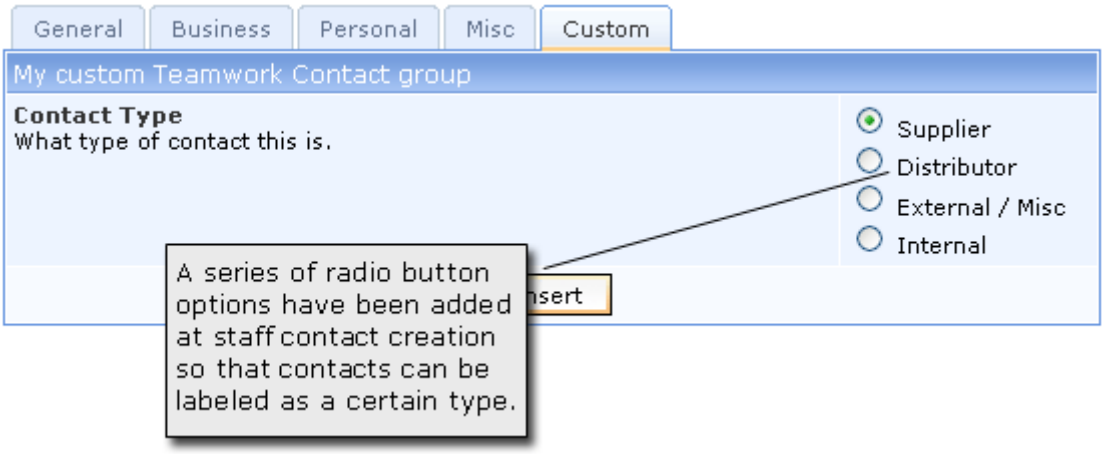
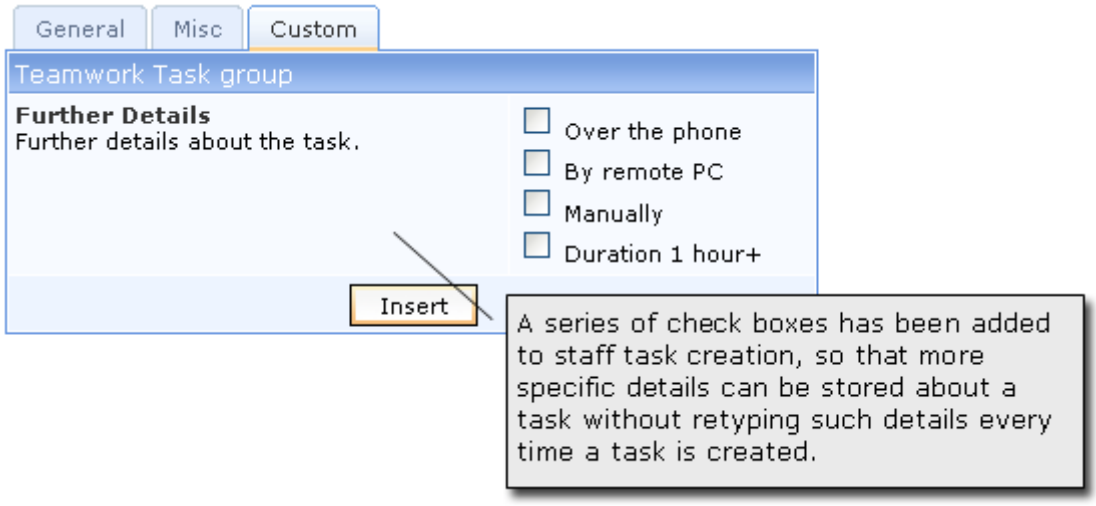
At staff event creation (appointments)



At staff contact creation



At staff task creation


General
Misc
Custom
Teamwork Task group
Further Details
Further details about the task.
Over the phone
By remote PC
Manually
Duration 1 hour+
Insert
A series of check boxes has been added to staff task creation, so that more specific details can be stored about a task without retyping such details every time a task is created.

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Live Support

Visitor bans made using the LiveResponse Client Application are managed in the administrator control panel. However, most of the server-side functionality of the live support module can be managed within the staff control panel (see live support in the staff control panel).

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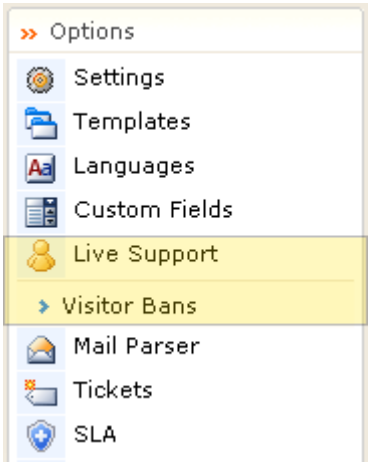
Visitor bans

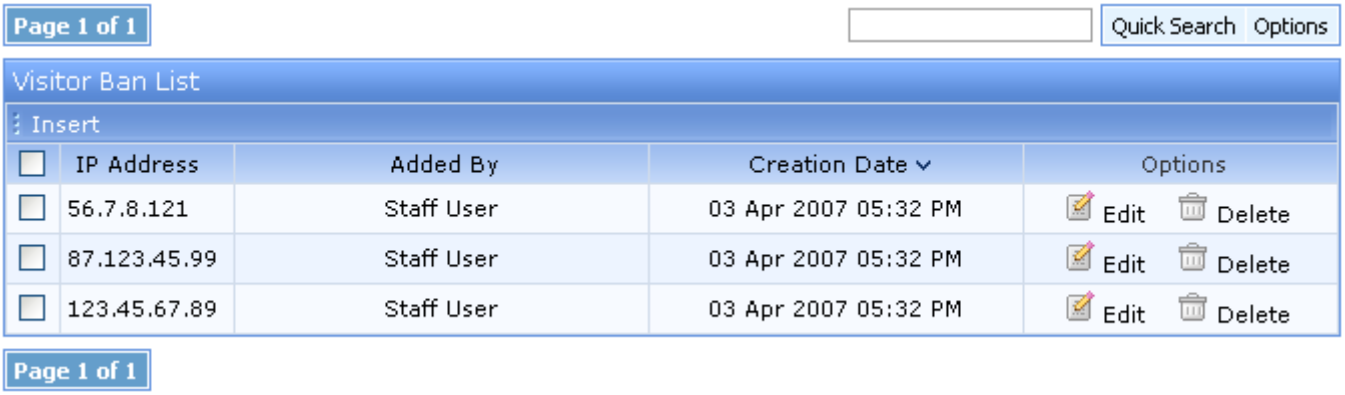
When a visitor is banned via the LiveResponse Client Application, the user is banned by their IP address. When banned, the visitor is unable to view the live support status image. The visitor is also ignored by the visitor tracking functions of the LiveResponse Client Application.

To manage visitor bans:

1. Click on **Visitor Bans** under the Live Support menu, as shown below.



You will be presented with a list of all visitor bans that are currently in place.



To **delete** a ban entry, click on the respective delete icon.

Selecting multiple bans (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, bans can be mass-deleted. Under the **Advanced Search** tab, replies can be searched for by IP address. Under the **Settings** tab, the number of bans shown per page (if there are many) can be limited.

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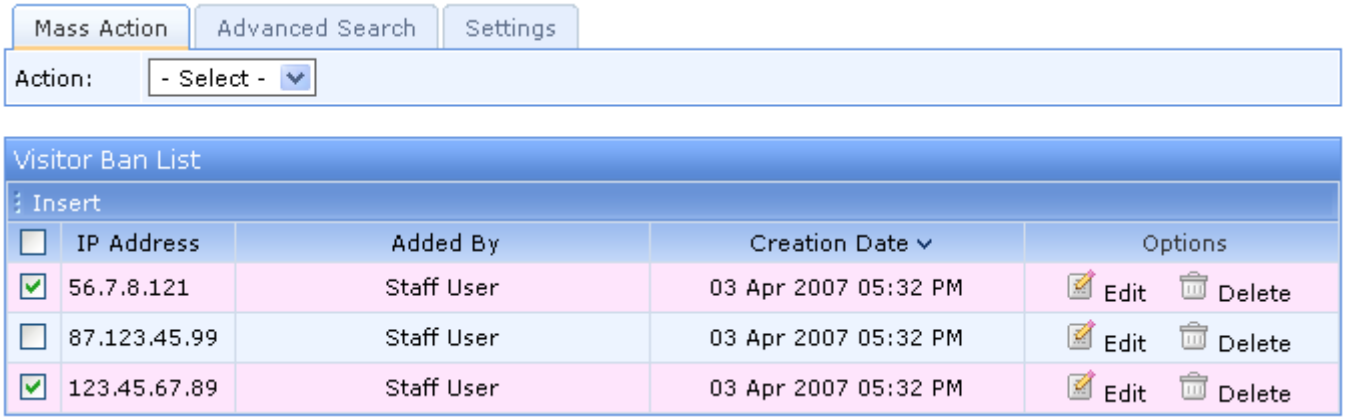
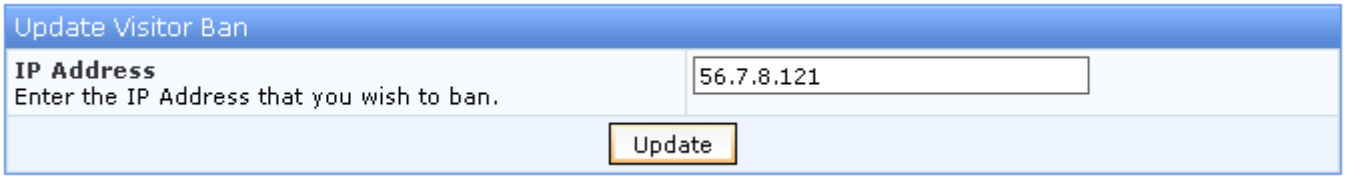


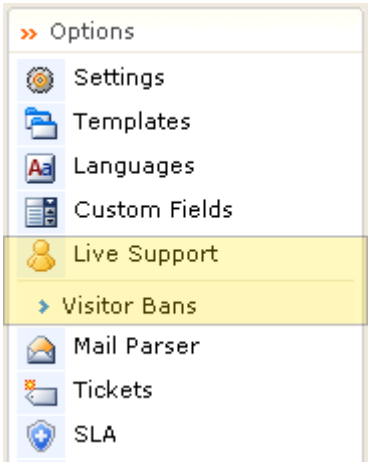
To **edit** a ban entry, click on the respective edit icon. From here, you will be able to edit the IP address entered for the ban, as shown below.



Manually adding a ban

To add a new visitor ban:

1. Click on **Visitor Bans** under the Live Support menu, as shown below.



You will be presented with a list of all visitor bans that are currently in place.

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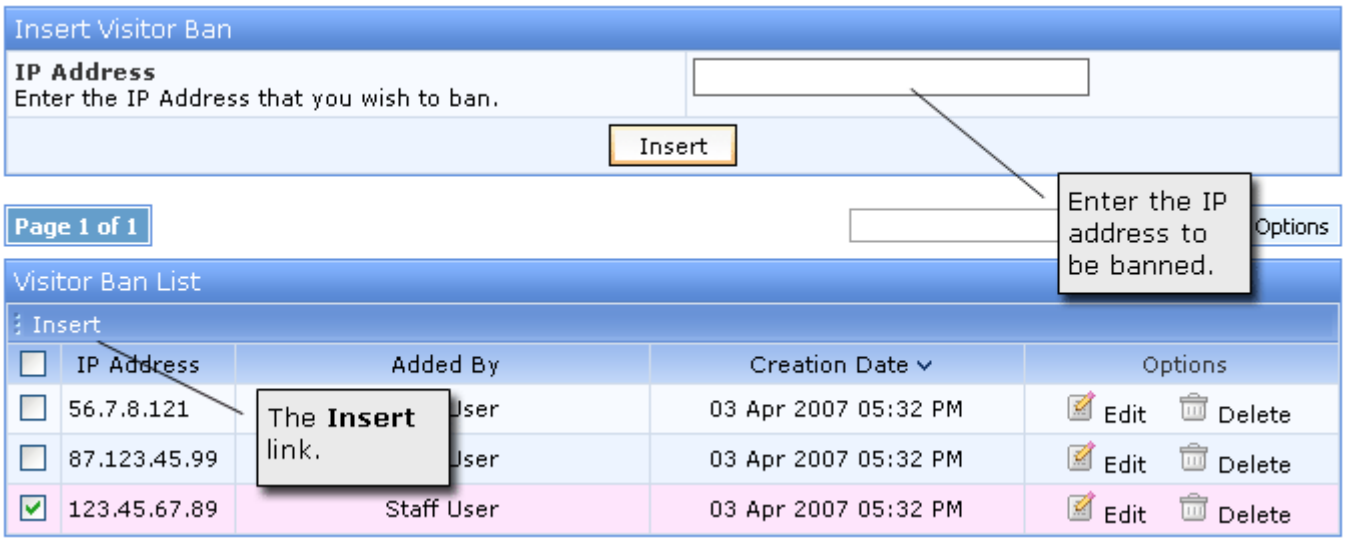

Click on the **Insert** link (shown above) and enter the IP address for the new ban, followed by clicking on the **Insert** button.

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Mail parser

The mail parser is not available in LiveResponse, as it comes as part of the **tickets** module (present in SupportSuite and eSupport only).

The mail parser system of SupportSuite and eSupport handles all incoming e-mail correspondence. The parser parses e-mails and applies system parse rules and user-defined files. As well as this and more crucially, the parser is responsible for determining what e-mails belong to what tickets (or in the case of a new line of correspondence, a new ticket).

PHP-based mail parsers (such as this one) are notorious for being unstable and not very decisive. However, the mail parser in the SupportSuite, eSupport and LiveResponse system is very **robust**, is not prone to **parsing mistakes** and is supported by many fall-back routines.

The mail system is built on **e-mail queues**. An e-mail must not be confused with a department.

An e-mail queue is an entry in the mail parser involving an e-mail address – for every e-mail address you wish to have mail delivered to the system through, a new e-mail queue is needed. An e-mail queue has properties such as a **fetch type** (piped e-mail or automatic POP3 collection), a assigned **template group** (see template groups), **auto-responder** settings and **registration requirement** settings.

A comparative example can be found in an e-mail client, such as Microsoft Office Outlook or Mozilla Thunderbird. An e-mail account in one of these clients can be compared to an e-mail queue. E-mail folders in one of these clients can be compared to a department.

The next major pass of the e-mail parser involves **parser rules** – these are user-defined rules that will look for a defined criteria and if matches, change defined settings or perform specified actions. On top of the parser rules system also sits **e-mail bans** and **catch-all** rules, for mail that comes into the system that doesn't match an e-mail queue.

See the diagram below for a brief explanation of how the mail parser handles e-mails and their respective queue and parsing procedures.

- For more information on setting up e-mail piping, see setting up e-mail piping in the installation guide.

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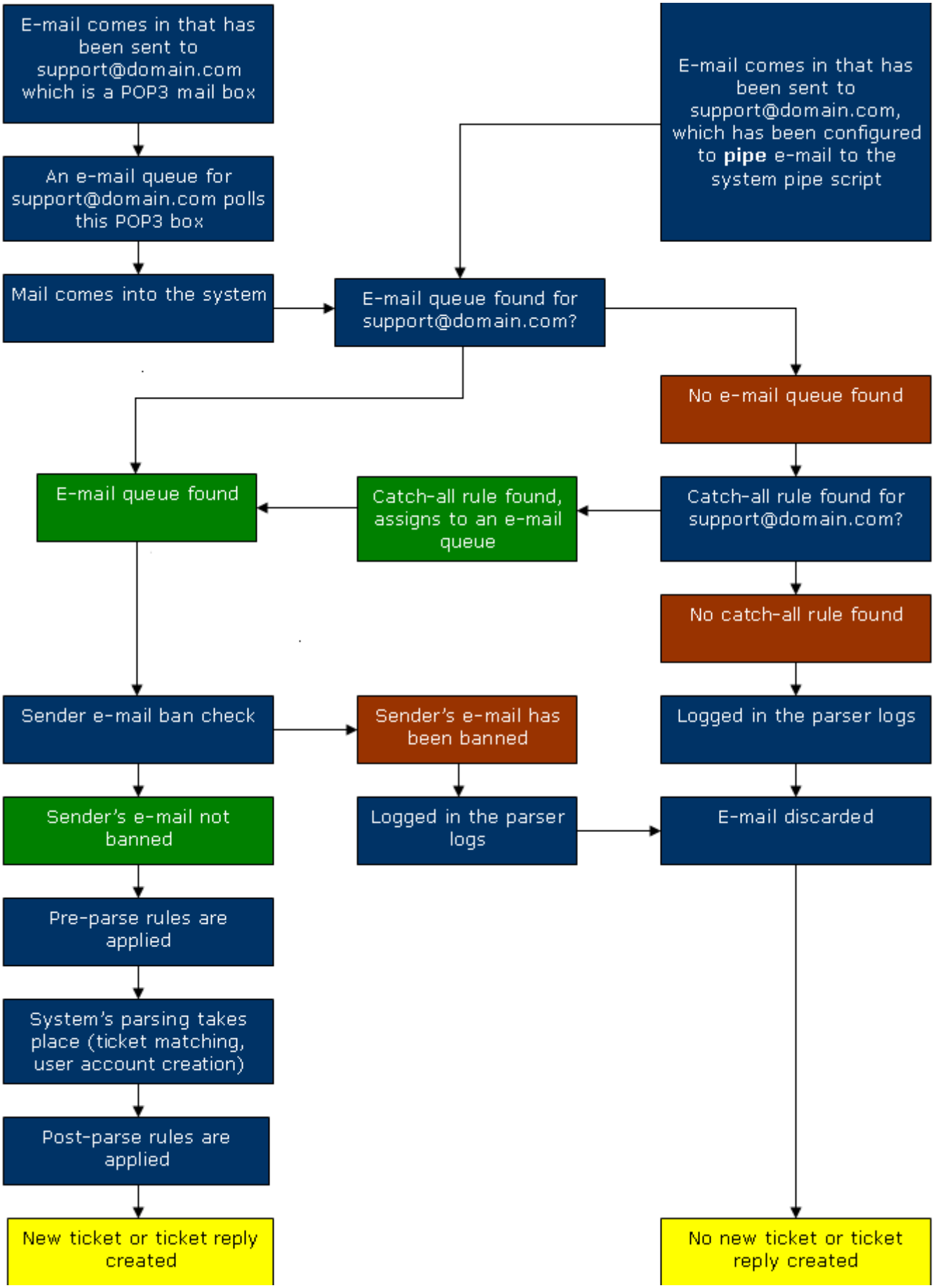
E-mail comes in that has been sent to support@domain.com which is a POP3 mail box
An e-mail queue for support@domain.com polls this POP3 box
Mail comes into the system
E-mail comes in that has been sent to support@domain.com, which has been configured to pipe e-mail to the system pipe script
E-mail queue found for support@domain.com?
No e-mail queue found
E-mail queue found
Catch-all rule found, assigns to an e-mail queue
Catch-all rule found for support@domain.com?
No catch-all rule found
Sender e-mail ban check
Sender's e-mail has been banned
Logged in the parser logs
Sender's e-mail not banned
Logged in the parser logs
E-mail discarded
Pre-parse rules are applied
System's parsing takes place (ticket matching, user account creation)
Post-parse rules are applied
New ticket or ticket reply created
No new ticket or ticket reply created

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E-mail queues

An e-mail queue is required for each e-mail address that you wish to accept e-mails through that will then go on to be parsed as tickets or ticket replies. For more information on the parsing process, see mail parser.

An e-mail queue can be created that will handle e-mail that is **piped** into the system (piping is the automatic "pushing" of an e-mail by the server into your installation of SupportSuite or eSupport). An e-mail queue can also be set up that will poll a POP3 or an IMAP e-mail box at intervals (where the e-mail is not pushed, but fetched).

The difference between piping (e-mail being pushed) and polling (e-mail being fetched):

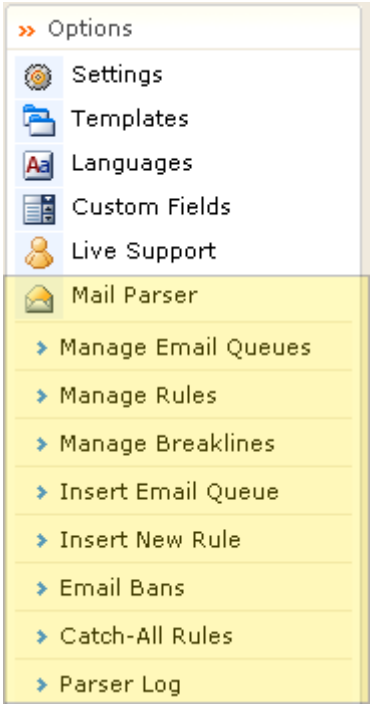
- Piped e-mail is fairly "instant" (in terms of receiving an e-mail).
- Polled e-mail is fetched every 10 minutes by a **scheduled task** (an automated task) that can only run when a SupportSuite or eSupport page is loaded.

Please note that automatic POP3 and IMAP fetching is disabled by default. For more information on the internal cron system (scheduled tasks), see scheduled tasks.

Managing e-mail queues

To view and manage e-mail queues:

1. Click on **Manage Email Queues** under Mail Parser on the Options menu, as shown below.



You will be presented with a list of all the e-mail queues configured for the system, as shown below.

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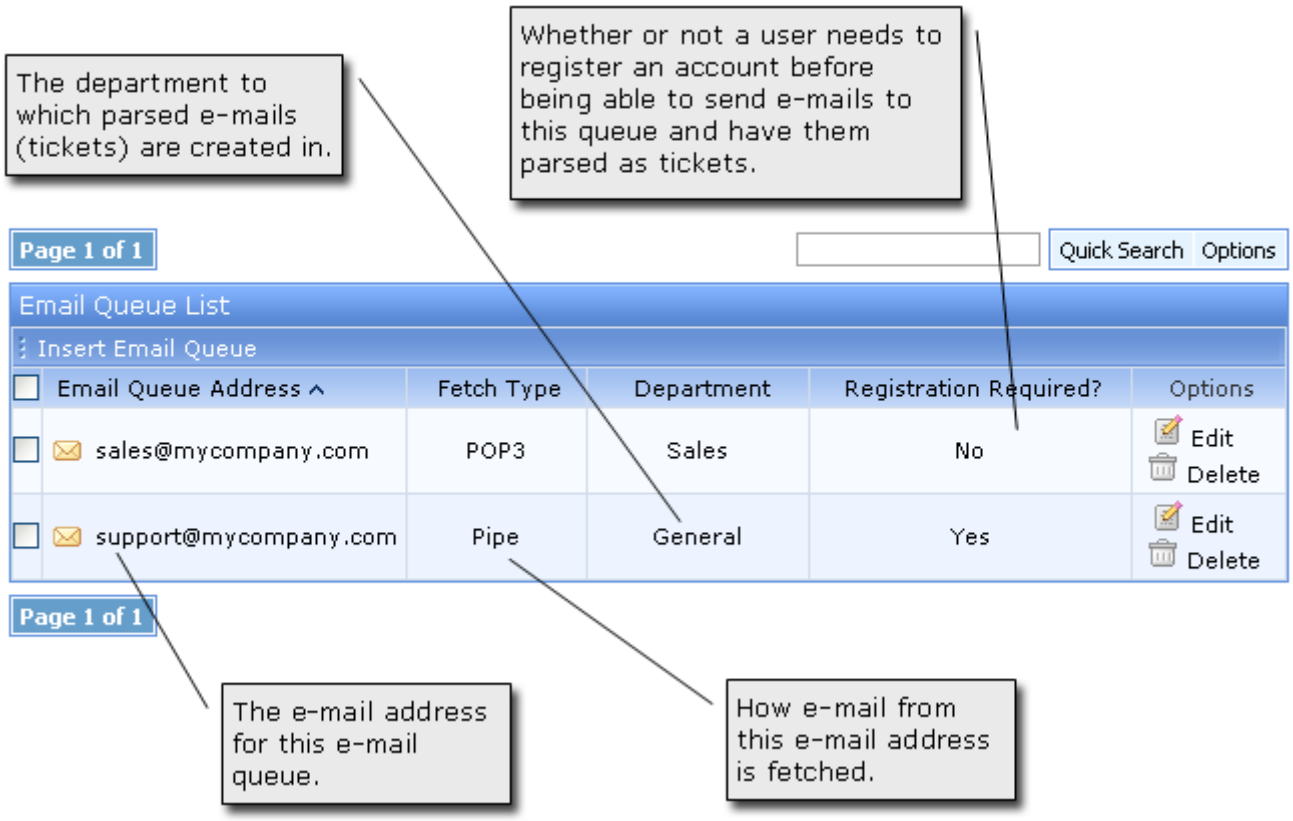
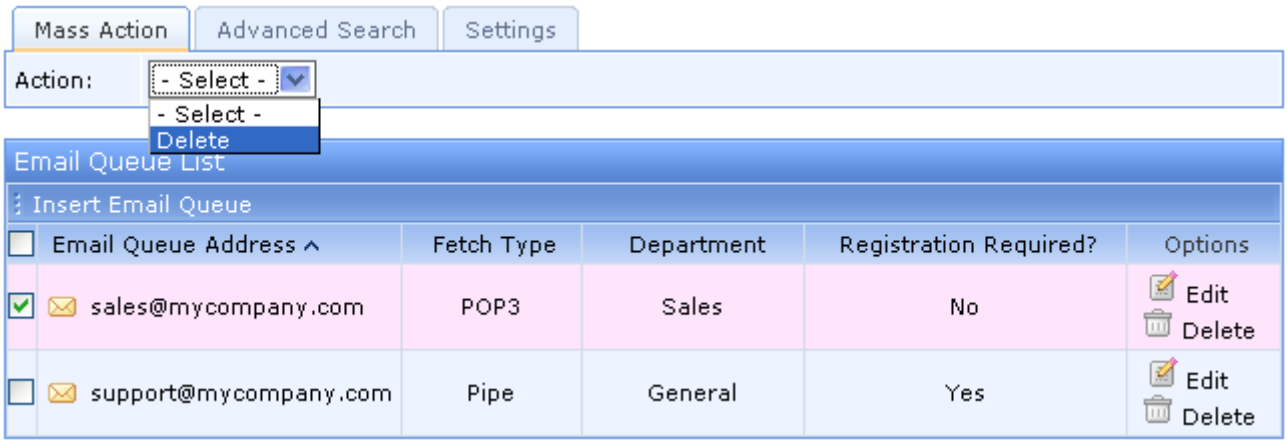


To **delete** an e-mail queue, click on the corresponding delete icon.

Selecting multiple queues (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, queues can be mass-deleted. Under the **Advanced Search** tab, queues can be searched for by address, priority, ticket status and the department to which the queue creates tickets in. Under the **Settings** tab, the number of queues shown per page (if there are many) can be limited.



To **edit** an e-mail queue, click on the corresponding edit icon.

Refer to e-mail queue fields for documentation on the required fields for an e-mail queue.

Creating a new e-mail queue

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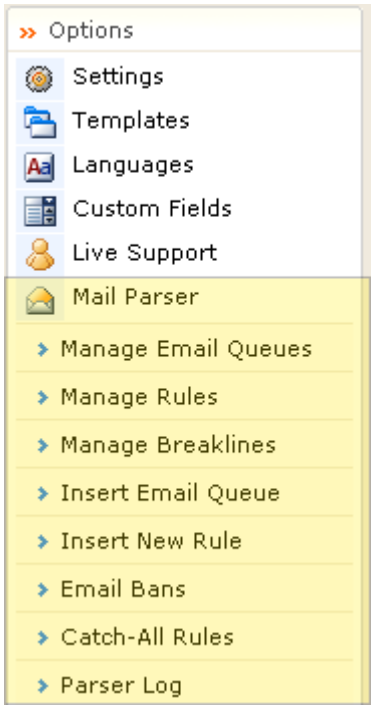
To create a new e-mail queue:

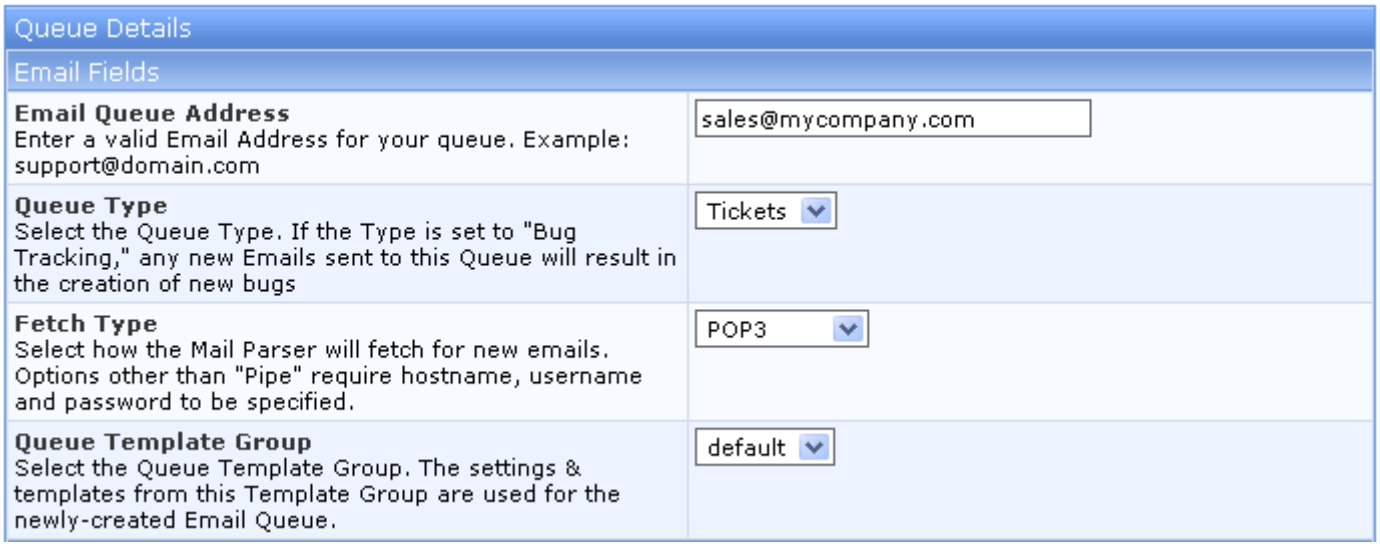
1. Click on **Insert Email Queue** under Mail Parser the Options menu, as shown below.



Refer to e-mail queue fields for documentation on the required fields for creating a new e-mail queue.

E-mail queue fields

From here, you will be able to edit most of the setting that are configurable for an e-mail queue, as shown below.


Queue Details
Email Fields
Email Queue Address
Enter a valid Email Address for your queue. Example: support@domain.com
sales@mycompany.com
Queue Type
Select the Queue Type. If the Type is set to "Bug Tracking," any new Emails sent to this Queue will result in the creation of new bugs
Tickets
Fetch Type
Select how the Mail Parser will fetch for new emails. Options other than "Pipe" require hostname, username and password to be specified.
POP3
Queue Template Group
Select the Queue Template Group. The settings & templates from this Template Group are used for the newly-created Email Queue.
default

Queue Details

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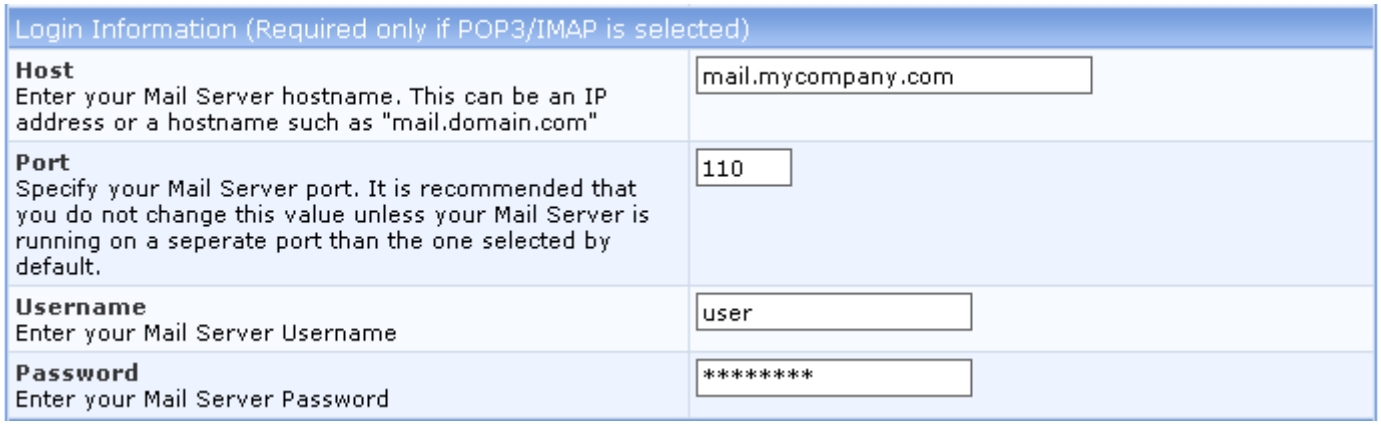
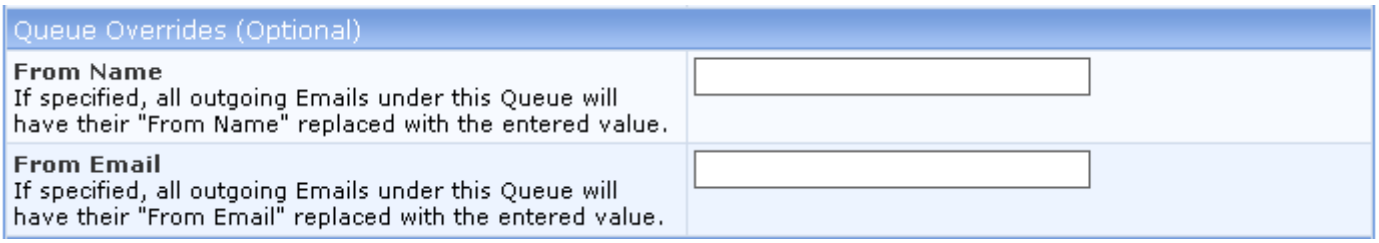
- **Email Queue Address** – the e-mail address from which e-mails will be received by this e-mail queue.
- **Queue Type** – for current versions of SupportSuite and eSupport, this can only be set to **tickets**.
- **Fetch Type** – the way this e-mail queue should fetch e-mails from the e-mail address set in *Email Queue Address*.


Login Information (Required only if POP3/IMAP is selected)
Host
Enter your Mail Server hostname. This can be an IP address or a hostname such as "mail.domain.com"
mail.mycompany.com
Port
Specify your Mail Server port. It is recommended that you do not change this value unless your Mail Server is running on a seperate port than the one selected by default.
110
Username
Enter your Mail Server Username
user
Password
Enter your Mail Server Password
****

Login Information

The login information is required only if you have selected POP3 or IMAP e-mail fetching for this e-mail queue.

- **Host** – the host or IP address of the mail server that the system should connect to.
- **Port** – the port via which the system should connect to the mail server (set in *Host*).
- **Username** – the username of the e-mail account for the account associated with the e-mail address set in *Email Queue Address*.
- **Password** – a password for the account associated with the e-mail address set in *Email Queue Address*.


Queue Overrides (Optional)
From Name
If specified, all outgoing Emails under this Queue will have their "From Name" replaced with the entered value.
From Email
If specified, all outgoing Emails under this Queue will have their "From Email" replaced with the entered value.

Queue Overrides

- **From Name** – if set, all outgoing e-mails sent from this queue (such as ticket replies, staff created tickets and auto-responders) will use this name in the **From** field of the e-mail. Otherwise, the staff or department name will be used (depending on the circumstance).
- **From Email** – if set, all outgoing e-mails sent from this queue (such as ticket replies, staff created tickets and auto-responders) will use this address in the **From** field of the e-mail. Otherwise, e-mail queue address will be used (depending on the circumstance).

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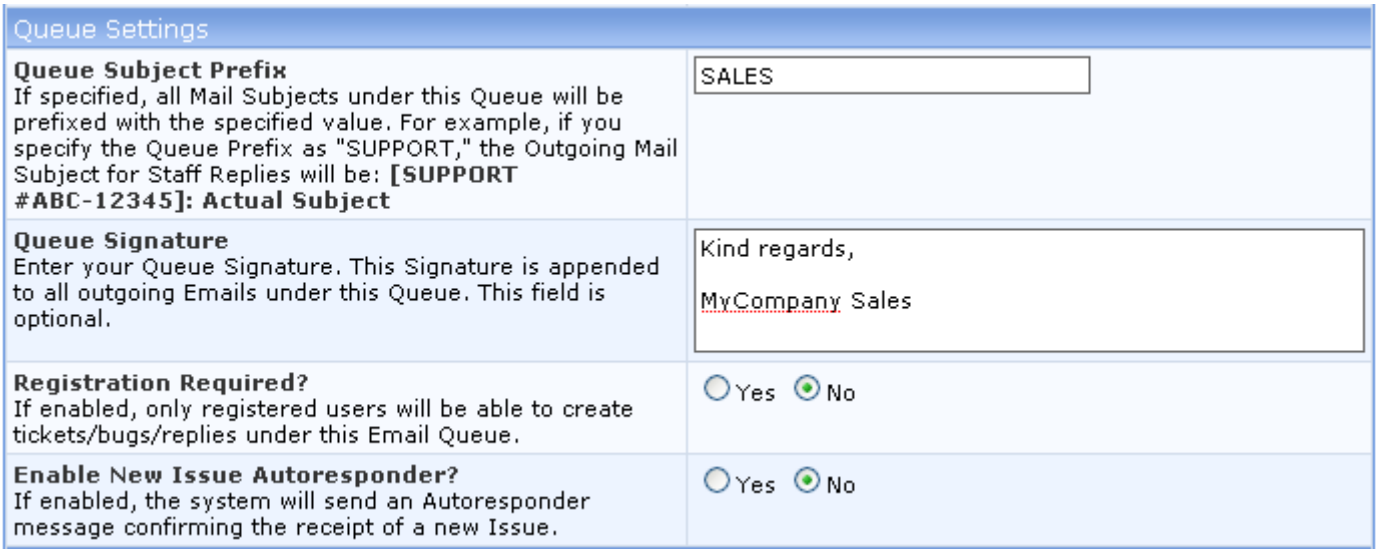
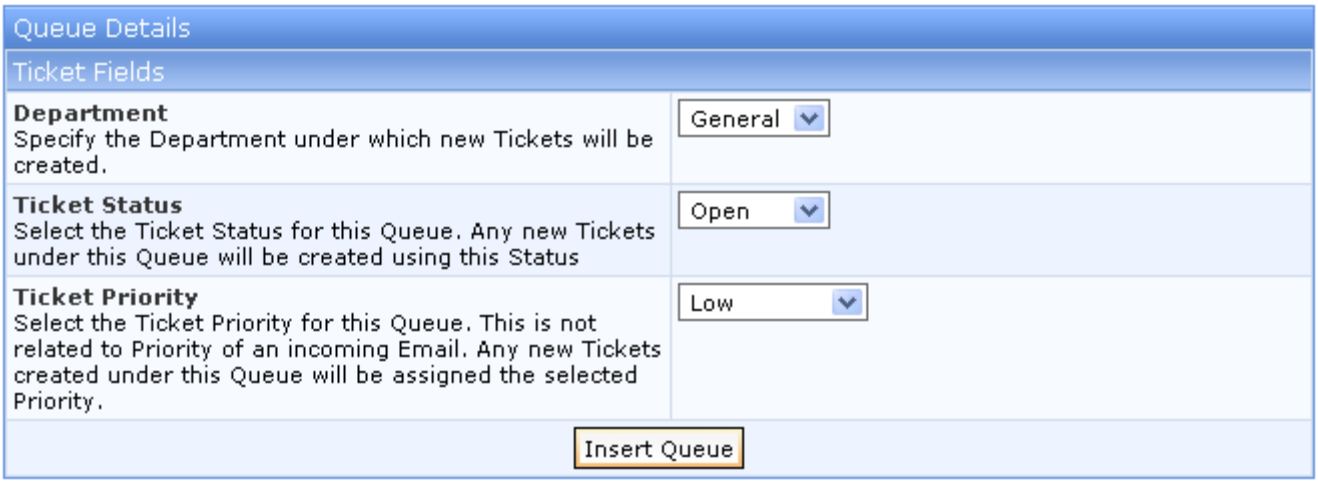

Queue Settings
Queue Subject Prefix
If specified, all Mail Subjects under this Queue will be prefixed with the specified value. For example, if you specify the Queue Prefix as "SUPPORT," the Outgoing Mail Subject for Staff Replies will be: [SUPPORT #ABC-12345]: Actual Subject
SALES
Queue Signature
Enter your Queue Signature. This Signature is appended to all outgoing Emails under this Queue. This field is optional.
Kind regards,
MyCompany Sales
Registration Required?
If enabled, only registered users will be able to create tickets/bugs/replies under this Email Queue.
Yes
No
Enable New Issue Autoresponder?
If enabled, the system will send an Autoresponder message confirming the receipt of a new Issue.
Yes
No

Queue Settings

- **Queue Subject Prefix** – by default, all outgoing e-mails associated with a ticket will be prefixed with the ticket's ticket ID (such as [#UYT-32624]). If an additional prefix is set here, it will be added to the prefix for the e-mail subject as [*YOUR PREFIX* # UYT-32624].
- **Queue Signature** – if set, this signature will be appended to the end of all outgoing e-mails sent under this e-mail queue (including staff replies).
- **Registration Required?** – if enabled, this setting will force all users to have already registered (via the client support interface or by opening a ticket by e-mail to another e-mail queue where registration was not required) before being able to send e-mails to this queue address.
- **Enable New Issue Autoresponder** – if enabled, an auto responder will be issues to a user who creates a new ticket using this e-mail queue.


Queue Details
Ticket Fields
Department
Specify the Department under which new Tickets will be created.
General
Ticket Status
Select the Ticket Status for this Queue. Any new Tickets under this Queue will be created using this Status
Open
Ticket Priority
Select the Ticket Priority for this Queue. This is not related to Priority of an incoming Email. Any new Tickets created under this Queue will be assigned the selected Priority.
Low
Insert Queue

Ticket Fields

- **Department** – the department in which tickets parses from e-mails sent to this e-mail queue will be placed.

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- **Ticket Status** – the default status a new ticket received by this e-mail queue will have.
- **Ticket Priority** – the default priority that a new ticket received by this e-mail queue will have.

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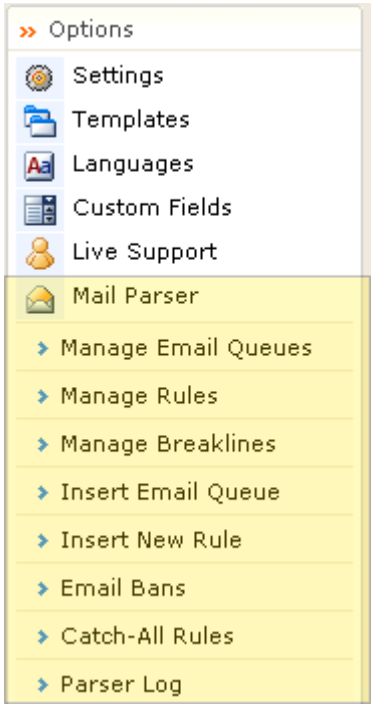
Parser rules

Parser rules allow you to perform a variety of actions or property changes on tickets or ticket replies parsed from e-mails by the mail parser. Parser rules can be executed wither **pre-parse** or **post-parse**. For more information on the way the mail parser system works, see mail parser.

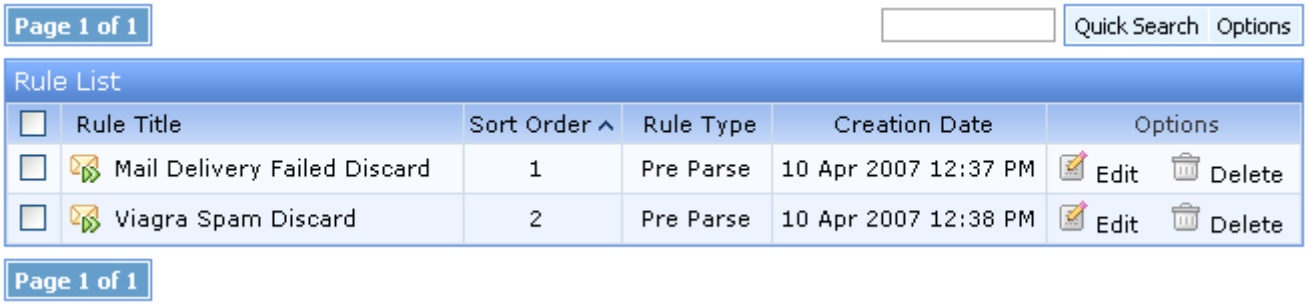
Managing parser rules

To view and manage parser rules:

1. Click on **Manage Rules** under Mail Parser on the Options menu, as shown below.



From here you can view and manage the current set of parser rules set up for your system, as shown below.



To **delete** a rule, click on the corresponding delete icon.

Selecting multiple rules (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, rules can be mass-deleted. Under the

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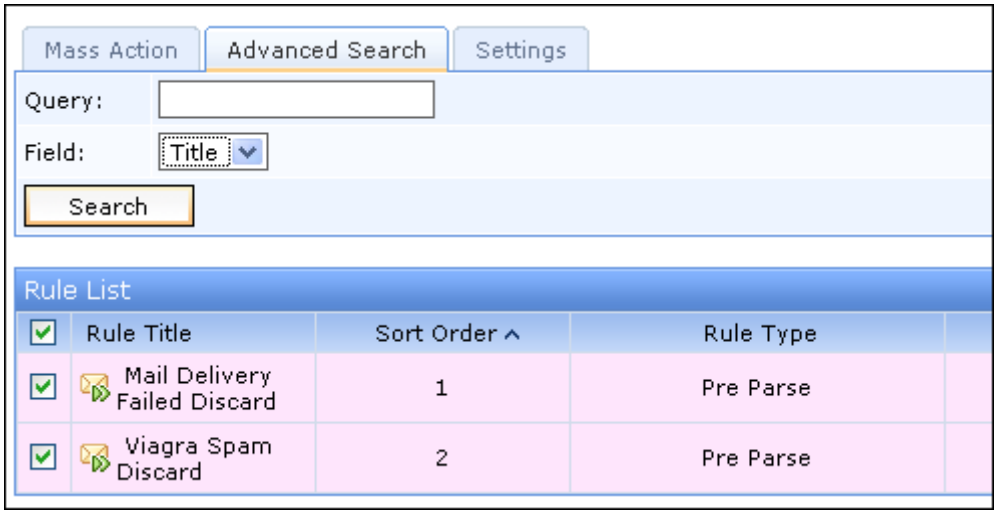
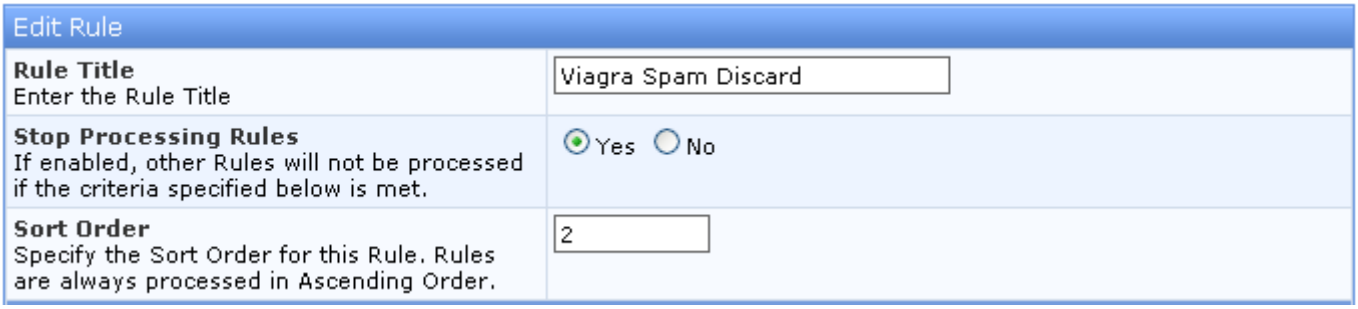
Advanced Search tab, rules can be searched for by. Under the **Settings** tab, the number of rules shown per page (if there are many) can be limited.



To **edit** a parser rule, click on the corresponding edit icon. From here, you will be able to edit the rules settings and actions for the selected parser rule.


Edit Rule
Rule Title
Enter the Rule Title
Viagra Spam Discard
Stop Processing Rules
If enabled, other Rules will not be processed if the criteria specified below is met.
Yes
No
Sort Order
Specify the Sort Order for this Rule. Rules are always processed in Ascending Order.
2

- **Rule Title** – a title for the rule.
- **Stop Processing Rules** – if enabled, if this rule is processed no other rules will be processed after it (rule processing will halt).
- **Sort Order** – rules are sorted and executed in ascending order, according to this sort order. A rule of sort order 1 will be executed first.

Now configure the rule criteria and the rule actions (to be performed pre-parse or post-parse).

Creating a new parser rule

To view and manage parser rules:

1. Click on **Insert New Rule** under Mail Parser on the Options menu, as shown below.

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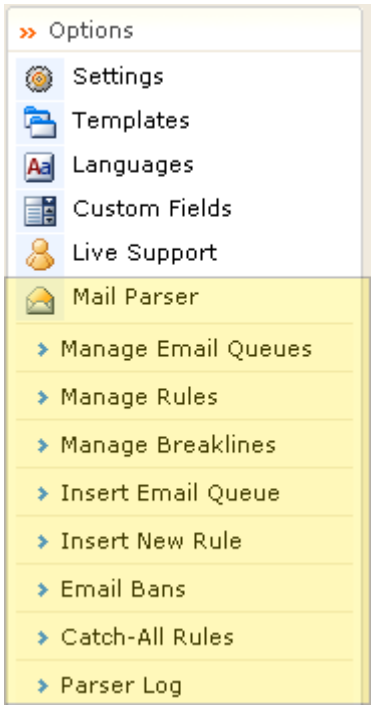
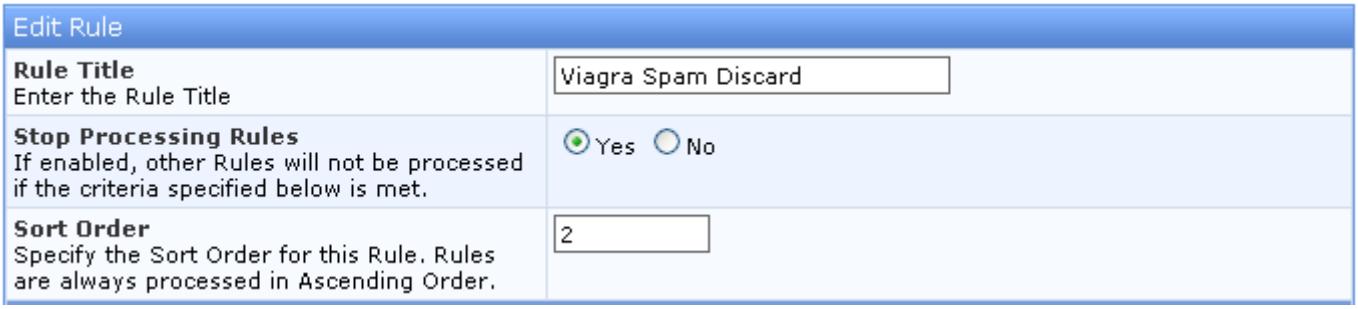


You will be presented with all the configurable settings for the new parser rule, as shown below.


Edit Rule
Rule Title
Enter the Rule Title
Viagra Spam Discard
Stop Processing Rules
If enabled, other Rules will not be processed if the criteria specified below is met.
Yes
No
Sort Order
Specify the Sort Order for this Rule. Rules are always processed in Ascending Order.
2

- **Rule Title** – a title for the rule.
- **Stop Processing Rules** – if enabled, if this rule is processed no other rules will be processed after it (rule processing will halt).
- **Sort Order** – rules are sorted and executed in ascending order, according to this sort order. A rule of sort order 1 will be parsed first.

Now configure the rule criteria and the rule actions (to be performed pre-parse or post-parse).

Criteria

Rule criteria are added here. You are able to add an unlimited number of criteria that will be used to match tickets. When an e-mail message is matched by the set of criteria entered here, the actions associated with this rule entry will be performed on the message.

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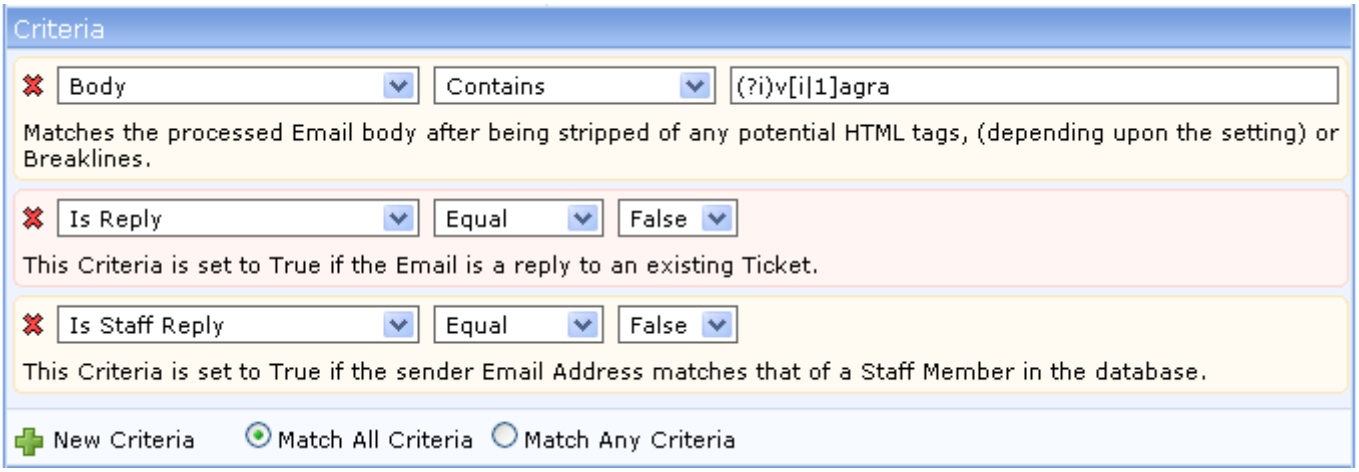
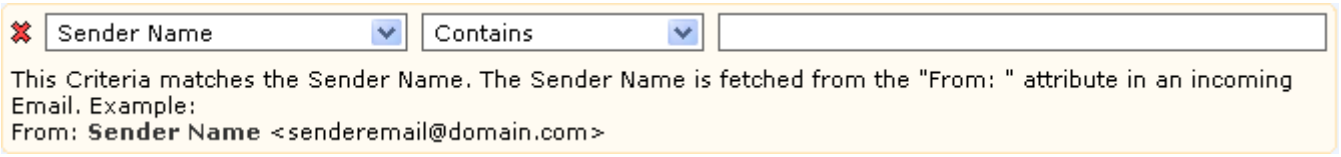
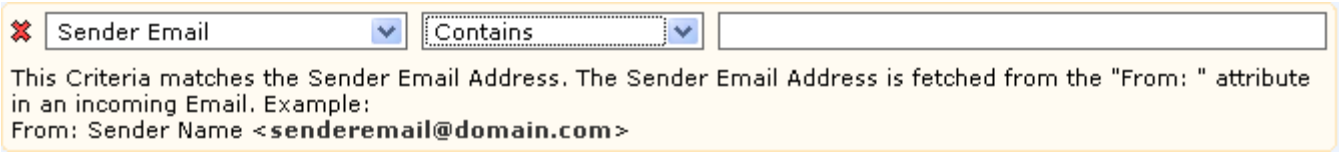
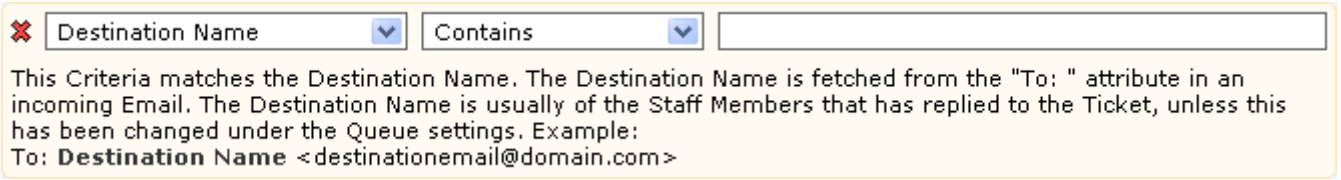

Criteria
Body
Contains
(?i)v[i|1]agra
Matches the processed Email body after being stripped of any potential HTML tags, (depending upon the setting) or Breaklines.
Is Reply
Equal
False
This Criteria is set to True if the Email is a reply to an existing Ticket.
Is Staff Reply
Equal
False
This Criteria is set to True if the sender Email Address matches that of a Staff Member in the database.
New Criteria
Match All Criteria
Match Any Criteria

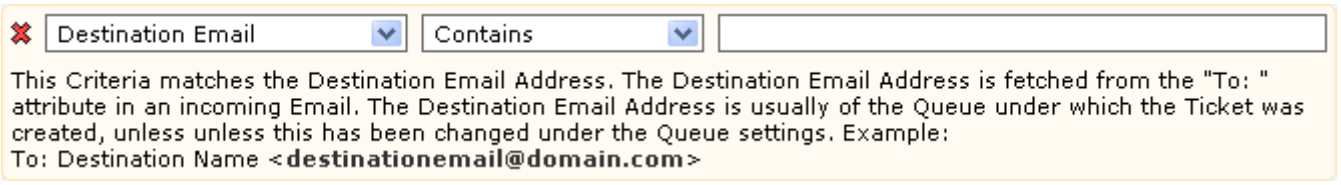
To add a new matching field, click on the new criteria icon. You must also set the **type of matching** to be performed.

If set to **match all criteria**, the parser rule will only "match" an e-mail message if all of the criteria fields are true for that ticket (**AND** logic). If set to **match any criteria**, only one of the criteria fields need to be true for this parser rule to "match" an e-mail message (**OR** logic).

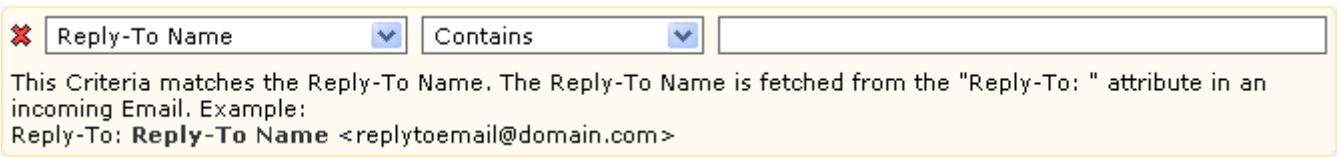

Sender Name
Contains
This Criteria matches the Sender Name. The Sender Name is fetched from the "From: " attribute in an incoming Email. Example:
From: Sender Name <senderemail@domain.com>


Sender Email
Contains
This Criteria matches the Sender Email Address. The Sender Email Address is fetched from the "From: " attribute in an incoming Email. Example:
From: Sender Name <senderemail@domain.com>


Destination Name
Contains
This Criteria matches the Destination Name. The Destination Name is fetched from the "To: " attribute in an incoming Email. The Destination Name is usually of the Staff Members that has replied to the Ticket, unless this has been changed under the Queue settings. Example:
To: Destination Name <destinationemail@domain.com>


Destination Email
Contains
This Criteria matches the Destination Email Address. The Destination Email Address is fetched from the "To: " attribute in an incoming Email. The Destination Email Address is usually of the Queue under which the Ticket was created, unless unless this has been changed under the Queue settings. Example:
To: Destination Name <destinationemail@domain.com>

- The **Destination** name and e-mail fields are also known as **recipient name** and **recipient e-mail address** (i.e. to what name and what address the e-mail is being sent.


Reply-To Name
Contains
This Criteria matches the Reply-To Name. The Reply-To Name is fetched from the "Reply-To: " attribute in an incoming Email. Example:
Reply-To: Reply-To Name <replytoemail@domain.com>

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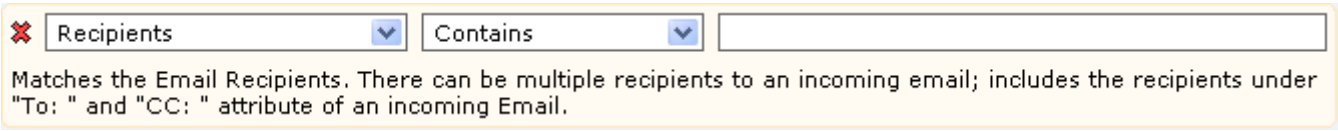
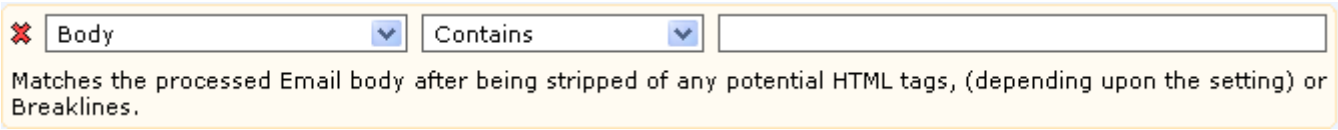
Reply-To Email
Contains
This Criteria matches the Reply-To Email Address. The Reply-To Email Address is fetched from the "Reply-To: " attribute in an incoming Email. Example:
Reply-To: Reply-To Name <replytoemail@domain.com>

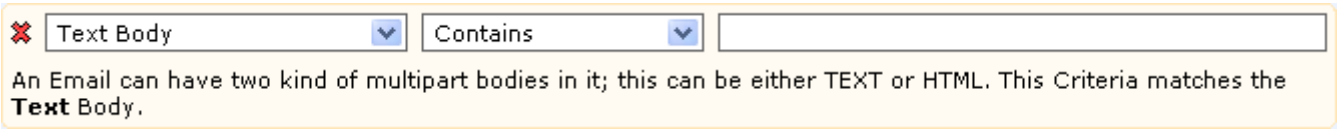
- Please note that the **Reply-To** fields are optional e-mail fields. Quite often, they are not present. Even modern e-mail clients do not yet fully support the Reply-To fields.

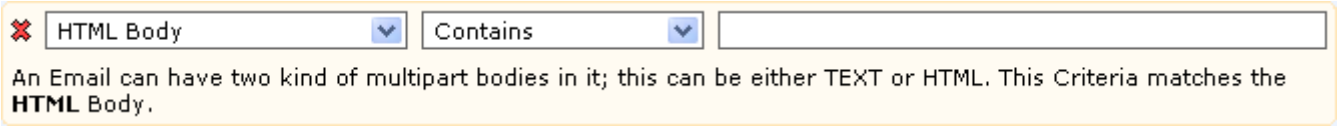

Recipients
Contains
Matches the Email Recipients. There can be multiple recipients to an incoming email; includes the recipients under "To: " and "CC: " attribute of an incoming Email.

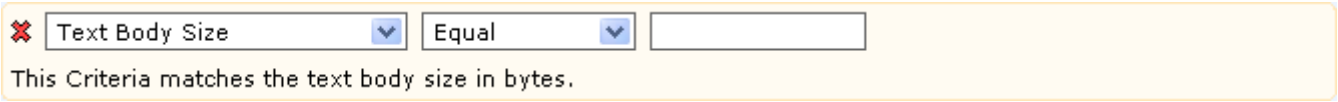
- **Recipients** means any e-mail address in the **To**, **Cc** and **BCc** fields.

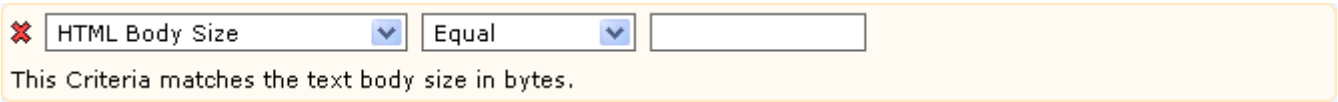

Body
Contains
Matches the processed Email body after being stripped of any potential HTML tags, (depending upon the setting) or Breaklines.

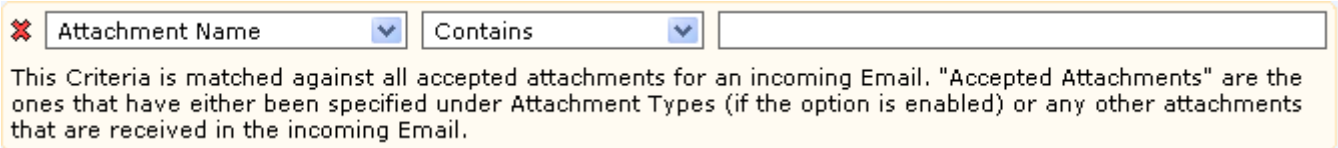
- **Body Size** refers to the size of the body (in bytes).

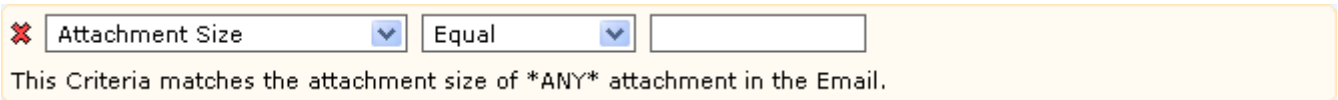

Text Body
Contains
An Email can have two kind of multipart bodies in it; this can be either TEXT or HTML. This Criteria matches the Text Body.


HTML Body
Contains
An Email can have two kind of multipart bodies in it; this can be either TEXT or HTML. This Criteria matches the HTML Body.






Attachment Name
Contains
This Criteria is matched against all accepted attachments for an incoming Email. "Accepted Attachments" are the ones that have either been specified under Attachment Types (if the option is enabled) or any other attachments that are received in the incoming Email.



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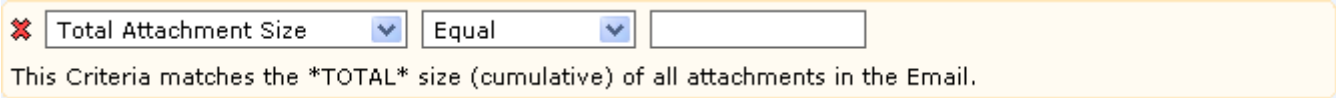
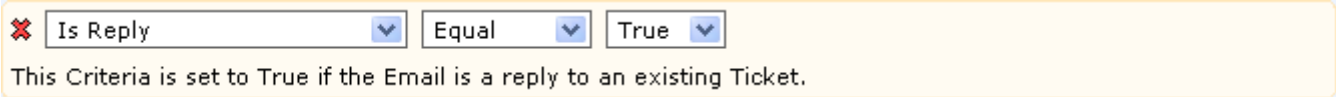
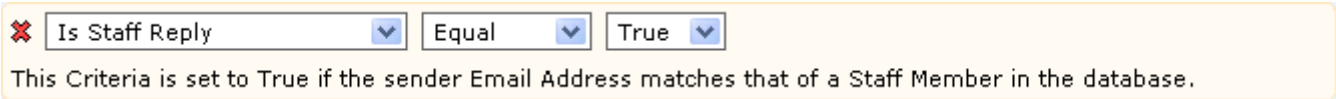
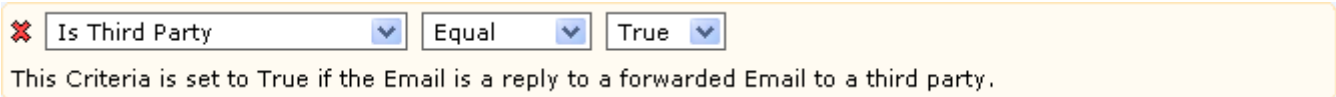
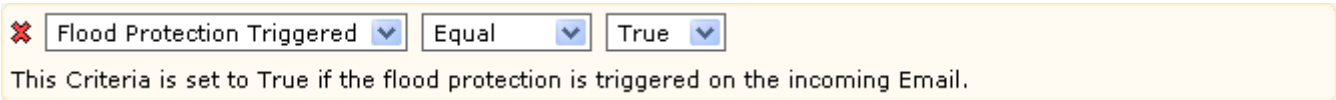


- **Attachment Sizes** refer to the size of the attachment file(s) in bytes.

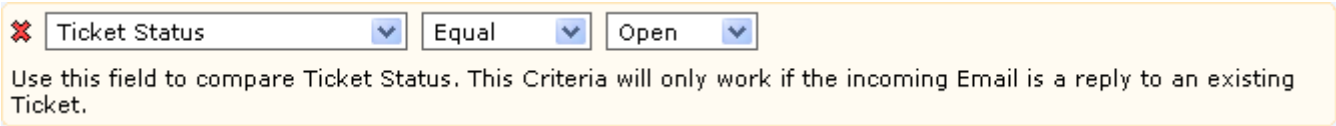



Is Staff Reply
Equal
True
This Criteria is set to True if the sender Email Address matches that of a Staff Member in the database.




Flood Protection Triggered
Equal
True
This Criteria is set to True if the flood protection is triggered on the incoming Email.

- For more information on the flood protection system, see flood protection.


Ticket Status
Equal
Open
Use this field to compare Ticket Status. This Criteria will only work if the incoming Email is a reply to an existing Ticket.

- The status referred to here refers to the status of the ticket that the e-mail message is in reply to.

To cancel adding a new criteria or to remove a criteria, click on the corresponding delete ✖ icon.

Pre-parse rules

Pre-parse rule execution takes place before the system parses the e-mail as a new ticket or as a ticket reply. For more information on the sequence of parsing, see mail parser.

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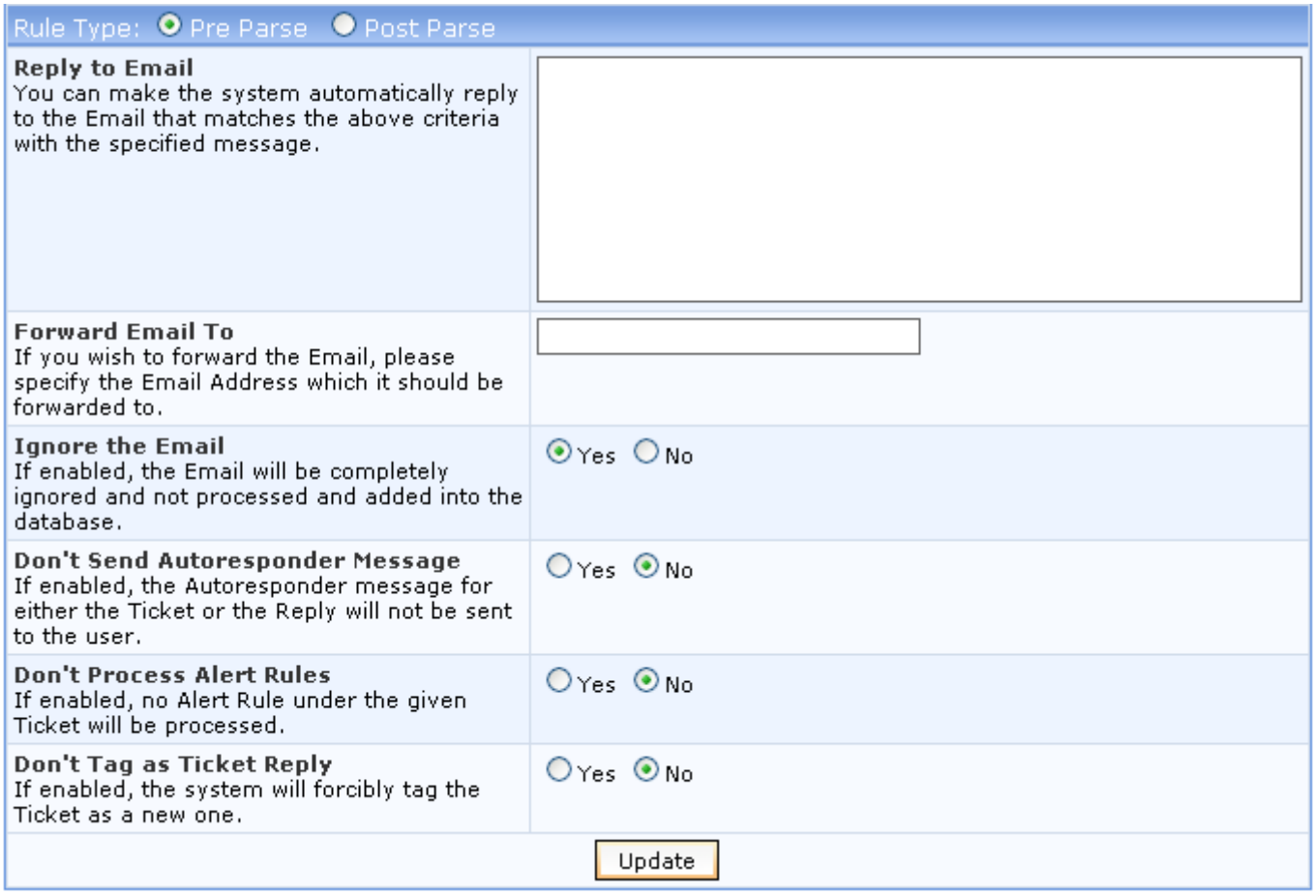
Rule Type: Pre Parse Post Parse
Reply to Email
You can make the system automatically reply to the Email that matches the above criteria with the specified message.
Forward Email To
If you wish to forward the Email, please specify the Email Address which it should be forwarded to.
Ignore the Email
If enabled, the Email will be completely ignored and not processed and added into the database.
Yes No
Don't Send Autoresponder Message
If enabled, the Autoresponder message for either the Ticket or the Reply will not be sent to the user.
Yes No
Don't Process Alert Rules
If enabled, no Alert Rule under the given Ticket will be processed.
Yes No
Don't Tag as Ticket Reply
If enabled, the system will forcibly tag the Ticket as a new one.
Yes No
Update

- **Reply to Email –** text entered here (optional) will be used to generate an auto-response to the received e-mail.
- **Forward Email To** – if an e-mail address is entered here, the e-mail received will be forwarded to this e-mail address.
- **Ignore the Email** – if enabled, the e-mail will be ignored completely. It will not be parsed into a ticket.
- **Don't Send Autoresponder Message** – if enabled, a receipt auto-responder will not be sent for this e-mail message (if an auto-responder has been enabled for the e-mail queue).
- **Don't Process Alert Rules** – if enabled, ticket alert rules that may match this incoming e-mail message will not be processed (see ticket alerts in the staff control panel).
- **Don't Tag as Ticket Reply** – if enabled, even if this e-mail has been detected to be a ticket reply (rather than a new ticket), it will be forcibly parsed as a new ticket.

Post-parse rules

Post-parse rule execution takes place after the system parses the e-mail as a new ticket or as a ticket reply. Therefore, post-parse rules are used to modify ticket properties rather than performing actions on an incoming e-mail. For more information on the sequence of parsing, see mail parser.

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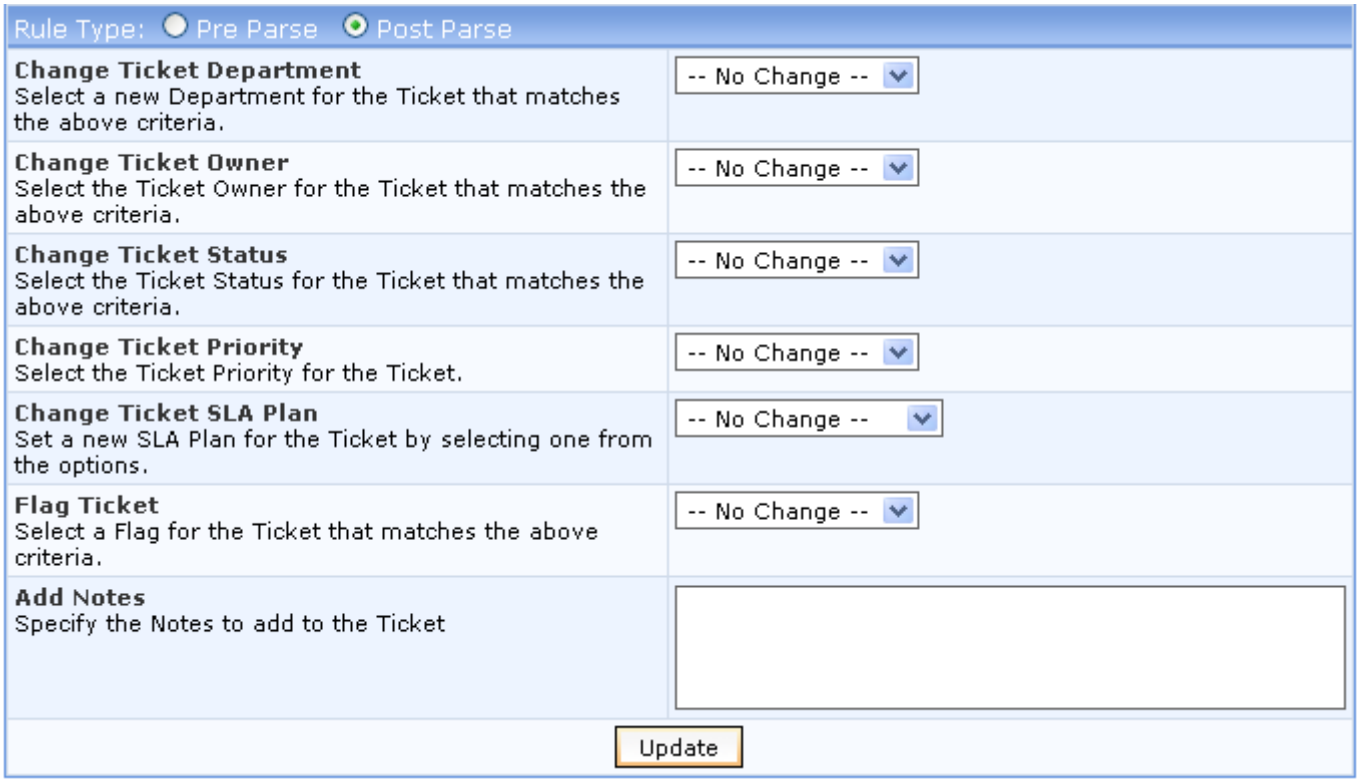
Rule Type: Pre Parse Post Parse
Change Ticket Department
Select a new Department for the Ticket that matches the above criteria.
-- No Change --
Change Ticket Owner
Select the Ticket Owner for the Ticket that matches the above criteria.
-- No Change --
Change Ticket Status
Select the Ticket Status for the Ticket that matches the above criteria.
-- No Change --
Change Ticket Priority
Select the Ticket Priority for the Ticket.
-- No Change --
Change Ticket SLA Plan
Set a new SLA Plan for the Ticket by selecting one from the options.
-- No Change --
Flag Ticket
Select a Flag for the Ticket that matches the above criteria.
-- No Change --
Add Notes
Specify the Notes to add to the Ticket
Update

- **Change Ticket Department** – if set, the department configured for the e-mail queue received the e-mail message will be overrode.
- **Change Ticket Owner** – the ticket can be assigned to a particular staff user (see ticket assignment / ticket ownership in the staff control panel).
- **Change Ticket Status** – if set, the default ticket status configured for the e-mail queue received the e-mail message will be overrode.
- **Change Ticket Priority** - if set, the default ticket priority configured for the e-mail queue received the e-mail message will be overrode (see ticket priority in the staff control panel).
- **Change Ticket SLA Plan** – assign the ticket to specified SLA plan (see
- **Flag Ticket** – if set, the ticket will be flagged with a specified flag color (see ticket flags in the staff control panel).
- **Add Notes** – text entered here will be appended to the ticket as a ticket note (see ticket and user notes in the staff control panel).

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Breaklines

SupportSuite and eSupport hold a database of breaklines. Breaklines are common strings that denote the end of a new e-mail reply, where previous replies have been conserved. An example is shown below.

Original e-mail sent to Ted from Support

Dear sir,

Thank you for getting back to us about this. Could you please provide your username and login details?

Kind regards,

Ryan Edwards

E-mail reply from Ted sent to Support

Username: ted
Password: 1234

-----Original Message----
> Dear sir,
>
> Thank you for getting back to us about this. Could you please provide your username and login > details?
>
> Kind regards,
>
> Ryan Edwards

Using the breaklines database as a reference, the mail parser will cut off the message reply when it finds **-----Original Message----** in the e-mail message.

The parser does this cutting so to ensure the threaded ticket view within the client support interface and staff control panel is clean when viewing a ticket – there is no need to preserve past correspondence in each reply, as the system maintains the past correspondence anyway. This system also saves on database space, search times and parsing times.

After the parser had snipped the e-mail reply at this breakline point, the stored reply would look like below.

E-mail reply from Ted sent to Support

Username: ted
Password: 1234

To view and manage existing breaklines:

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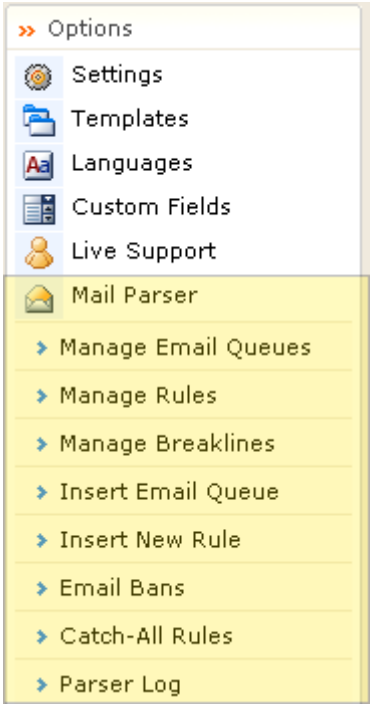
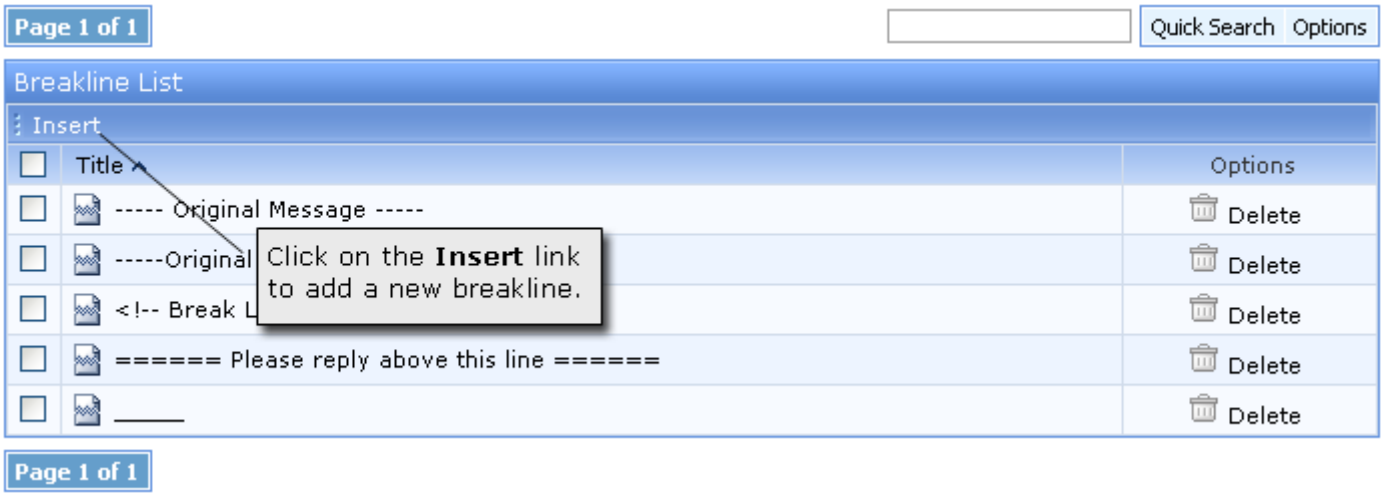
1. Click on **Manage Breaklines** under Mail Parser on the Options menu, as shown below.



You will be presented with a list of all the current breaklines saved in the database. The breaklines shown below are added by default.



To **delete** a breakline, click on the corresponding delete icon.

To **add** a new breakline to the database, click on the **Insert** link (indicated above). An entry area will appear on the same page, into which you can enter a new breakline.

Selecting multiple breaklines (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, breaklines can be mass-deleted. Under the **Advanced Search** tab, breaklines can be searched for by content. Under the **Settings** tab, the number of breaklines shown per page (if there are many) can be limited.

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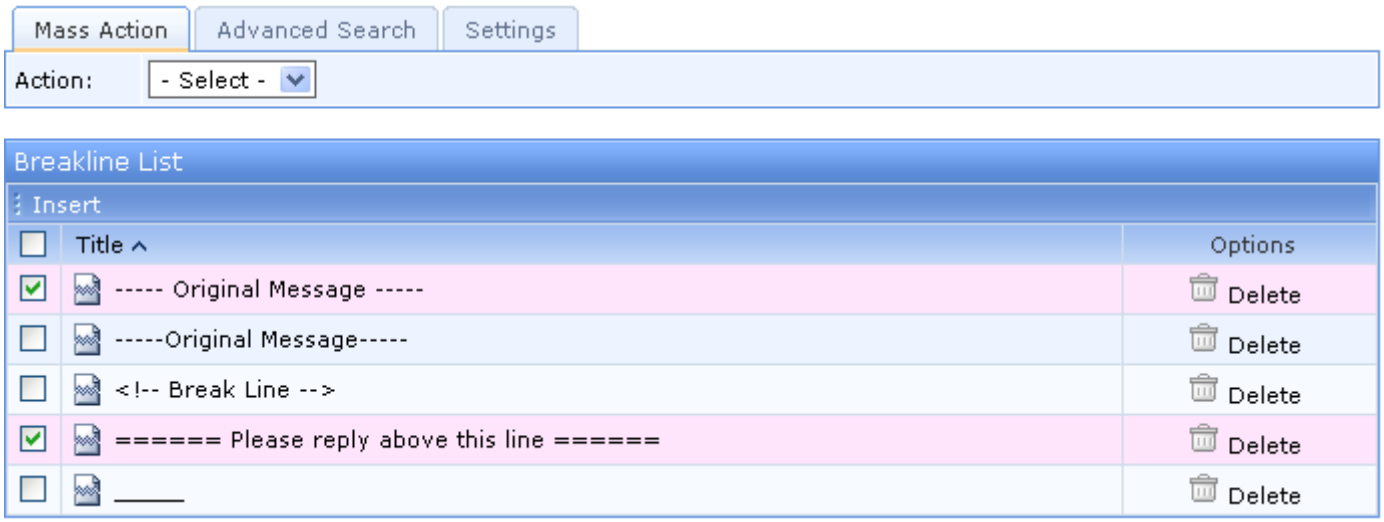

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Catch-all rules

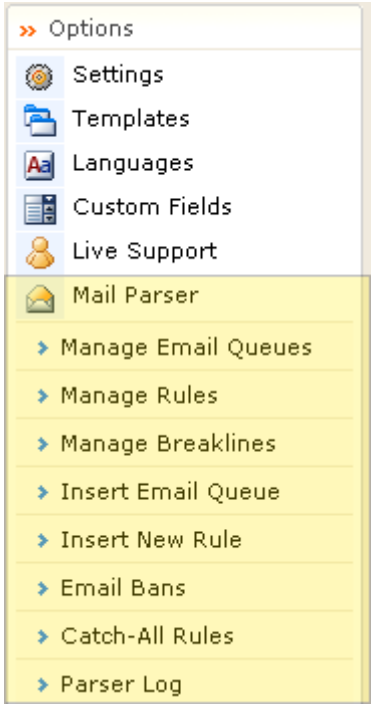
Catch-all rules can be used as a "safety net" to ensure that e-mails do not get lost. This rules set can also be used to define a rule that will match a specific or wide range of properties, and redirect them to a **specified e-mail queue**. When an e-mail queue cannot be found for an incoming e-mail message, the catch-all rules are executed.

When an e-mail message's destination address does not match any of the addresses defined by e-mail queues (see e-mail queues), the parser will look to see if the e-mail message is caught by a catch-all rule. If it has, the e-mail will be handled by the rule. If the e-mail is not caught, it will be discarded.

For more information on the parsing process and the order of parser operations, see mail parser.

To view and manage catch-all rules:

1. Click on **Catch-All Rules** under Mail Parser on the Options menu, as shown below.



You will be presented with an entry form (allowing you to create a new catch-all rule) as well as a list of existing catch-all rules.

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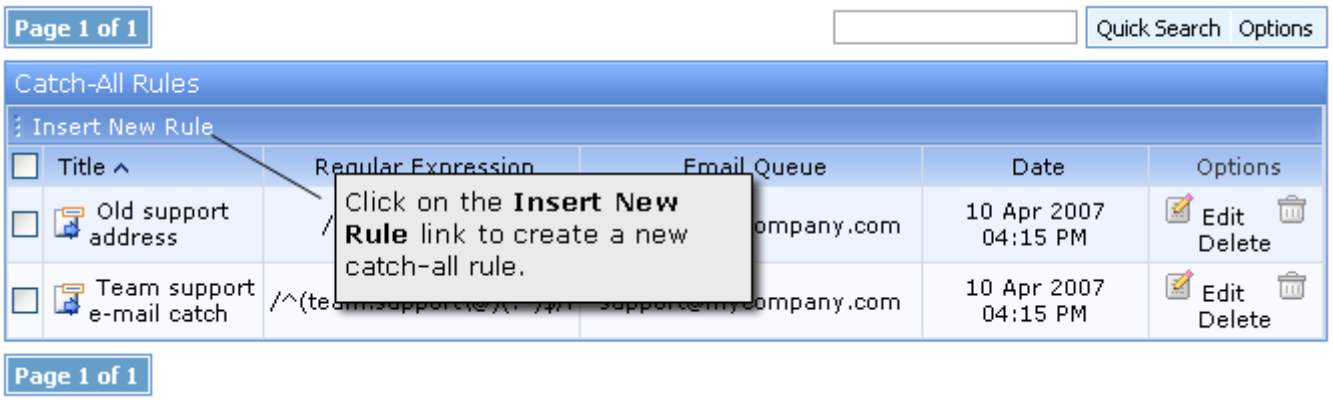
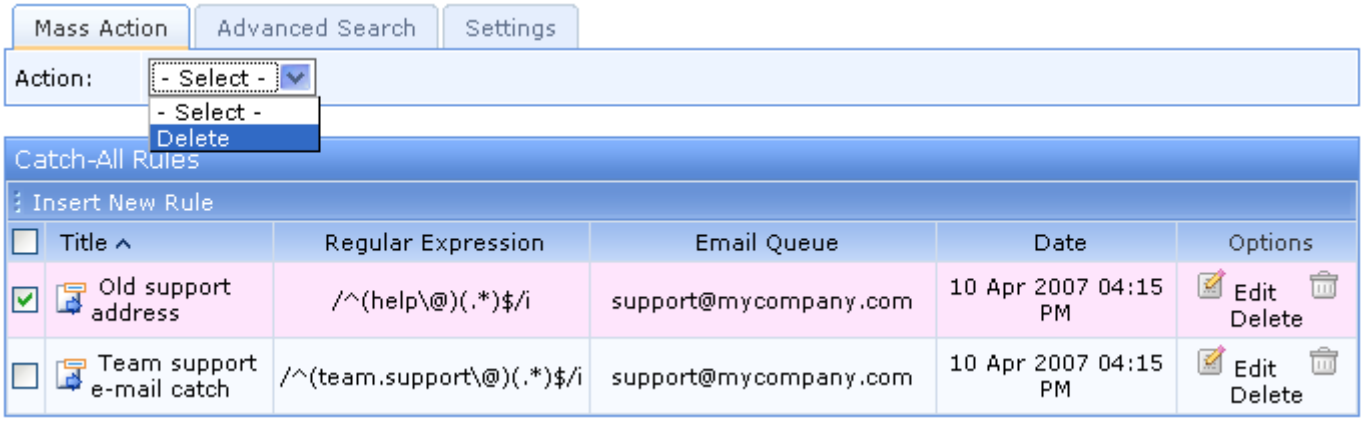


To **delete** a catch-all rule, click on the corresponding delete icon.

To **insert** a new catch-all rule, click on the **Insert New Rule** link as indicated to above.

Selecting multiple rules (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, rules can be mass-deleted. Under the **Advanced Search** tab, rules can be searched for by title or their regular expression. Under the **Settings** tab, the number of rules shown per page (if there are many) can be limited.



To **edit** a catch-all rule, click on the corresponding edit icon. From here, you are able to edit the properties and settings of the catch-all rule.

Refer to catch-all rule fields for documentation on the required fields for editing a catch-all rule.

Creating a catch-all rule

To create a new catch-all rule:

1. Click on **Catch-All Rules** under Mail Parser on the Options menu, as shown below.

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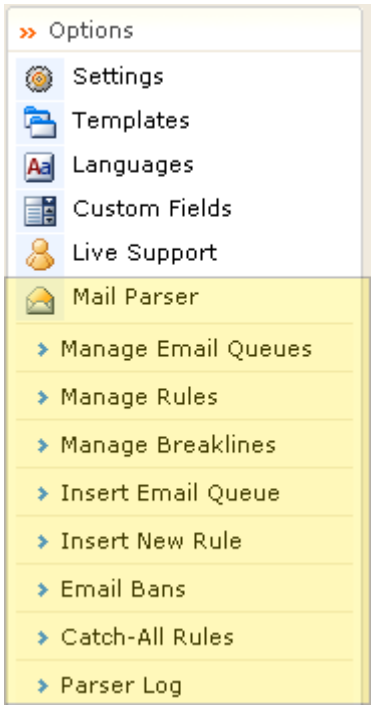
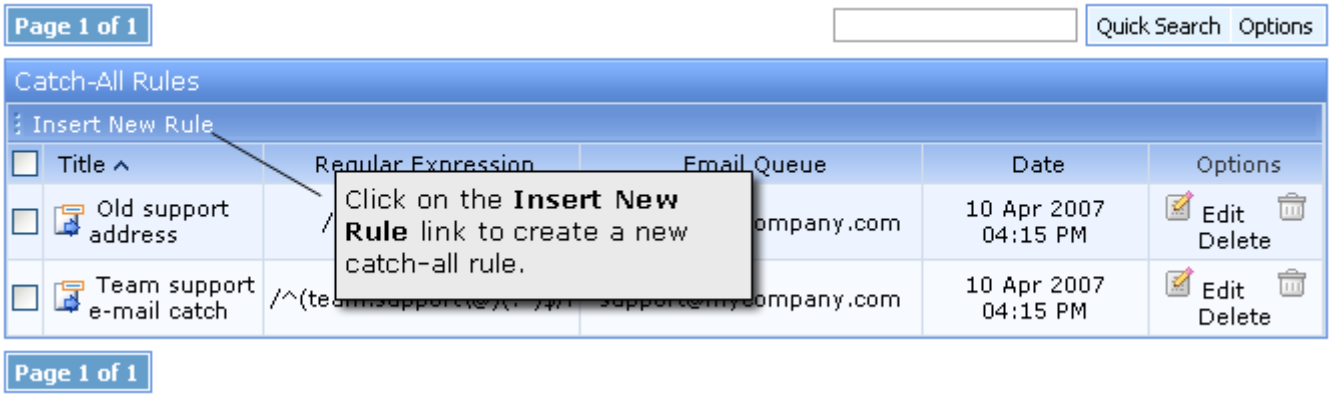


To **insert** a new catch-all rule, click on the **Insert New Rule** link as indicated to below.



Refer to [catch-all rule fields] for documentation on the required fields for creating a new catch-all rule.

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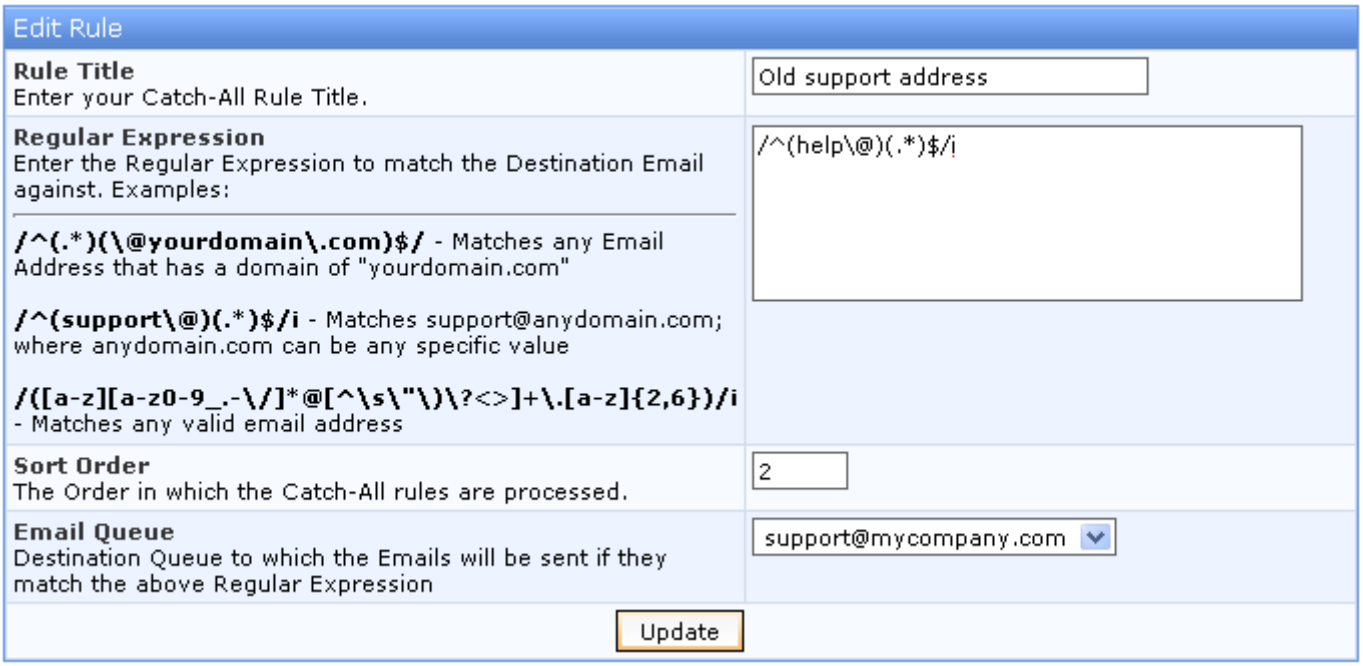
Catch-all rule fields


Edit Rule
Rule Title
Enter your Catch-All Rule Title.
Old support address
Regular Expression
Enter the Regular Expression to match the Destination Email against. Examples:
/^(.*)(\@yourdomain\.com)$/ - Matches any Email Address that has a domain of "yourdomain.com"
/^(support\@)(.*)$/i - Matches support@anydomain.com; where anydomain.com can be any specific value
/([a-z][a-z0-9_.-\/]*@[^\s\"\)\?<>]+\.[a-z]{2,6})/i - Matches any valid email address
/^(help\@)(.*)$/i
Sort Order
The Order in which the Catch-All rules are processed.
2
Email Queue
Destination Queue to which the Emails will be sent if they match the above Regular Expression
support@mycompany.com
Update

- **Rule Title** – a title for the catch-all rule.
- **Regular Expression** – catch-all rules work through my matching destination e-mail addresses using regular expressions. For more information on the regular expressions, see www.php.net/preg_match.
- **Sort Order** – catch-all rules are sorted and executed in ascending order, according to this sort order. A rule of sort order 1 will be executed first.
- **Email Queue** – specify the e-mail queue to which the "caught" e-mail should be transferred. See e-mail queues.

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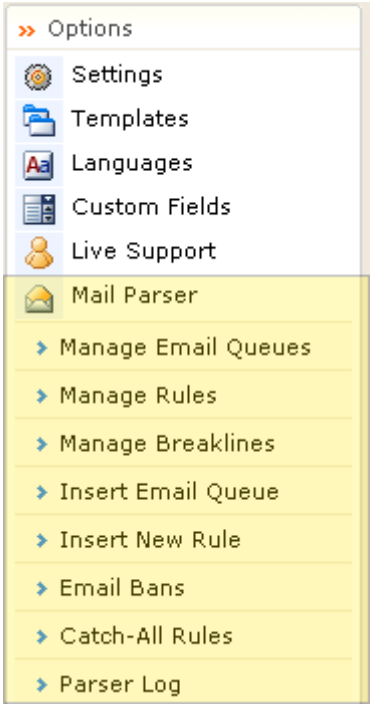
E-mail bans

If an e-mail comes into an e-mail queue from an address that is in the e-mail ban database, the e-mail will be discarded and the action logged in the mail parser log. The user who's e-mail address was banned will not be notified that their e-mail was discarded – i.e. they will not receive a bounce e-mail message.

For more information on the sequence of parsing operations made by the mail parser, see mail parser.

To view and manage e-mail bans rules:

1. Click on **Email Bans** under Mail Parser on the Options menu, as shown below.



You will be presented with a list of all the currently banned e-mail addresses, as shown below.

To **delete** an e-mail ban, click on the corresponding delete icon.

To **insert** a new e-mail ban, click on the **Insert Ban** link as indicated to above.

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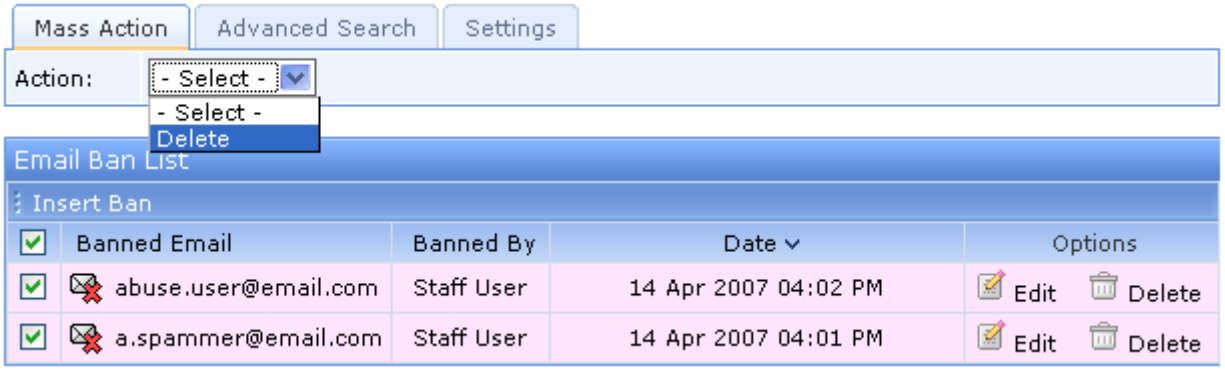
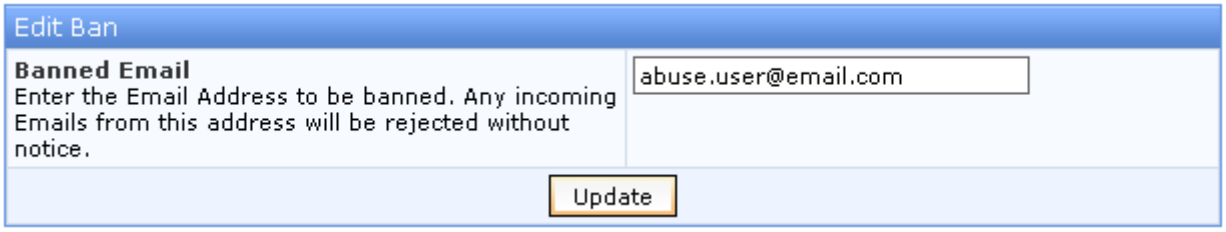
Selecting multiple e-mail bans (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, bans can be mass-deleted. Under the **Advanced Search** tab, bans can be searched for by address. Under the **Settings** tab, the number of bans shown per page (if there are many) can be limited.



To **edit** an existing e-mail ban, click on the corresponding edit icon. From here, you are able to edit the address of the ban entry.


Edit Ban
Banned Email
Enter the Email Address to be banned. Any incoming Emails from this address will be rejected without notice.
abuse.user@email.com
Update

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Parser log

A guide to the parser log can be found in the logs section.

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Tickets

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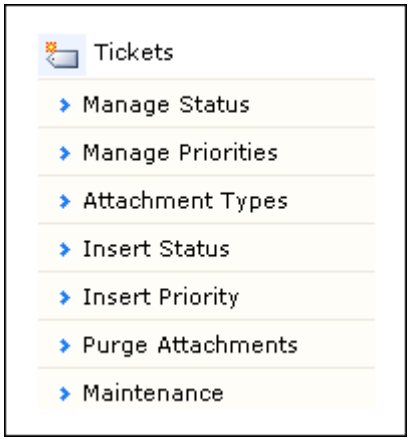
Statuses

Every ticket has a **status**. The system default ticket statuses are **Open**, **Closed** and **On Hold**. As well as having a default set of statuses. Custom ticket statuses can be defined here, in the administrator control panel.

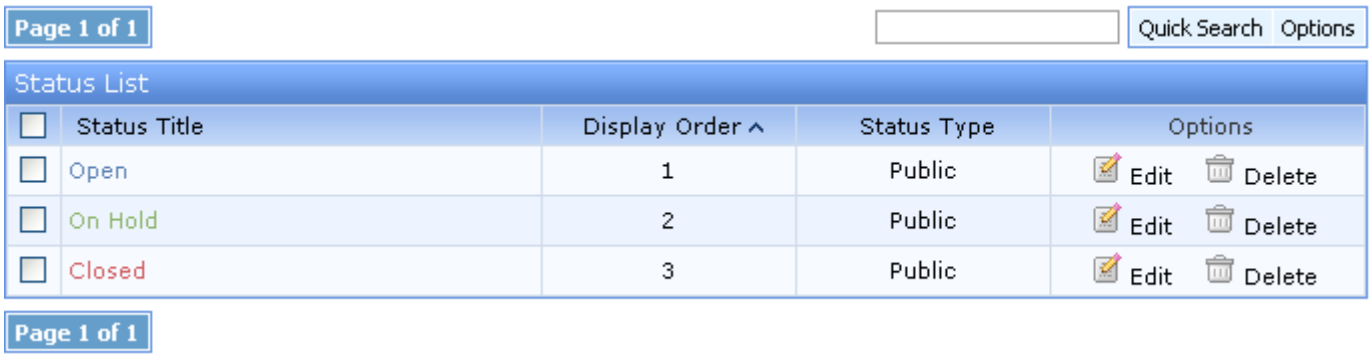
For more information on using and manipulating ticket statuses, see ticket status in the staff control panel.

To view and manage ticket statuses:

1. Under the Tickets menu, click on **Manage Status**, as shown below.



A list of all the system's ticket statuses will be shown, as below.



To **delete** a ticket status, click on the corresponding delete icon.

Selecting multiple ticket statuses (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, statuses can be mass-deleted. Under the **Advanced Search** tab, statuses can be searched for by title. Under the **Settings** tab, the number of statuses shown per page (if there are many) can be limited.

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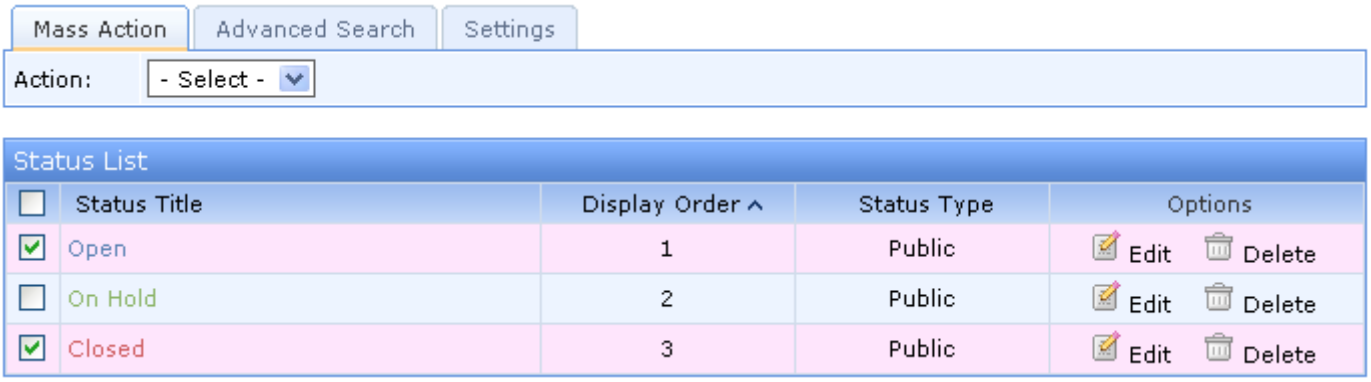


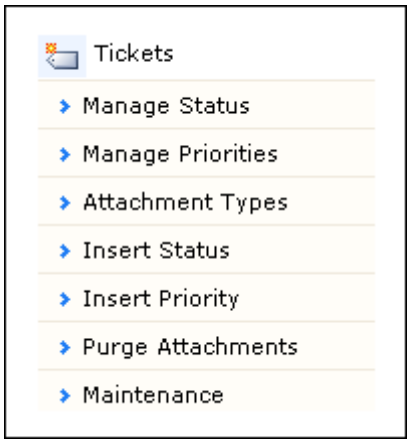
To **edit** a ticket status, click on the corresponding edit icon. From here, you will be able to configure the selected status.

From here, you will be able to name and configure the new status. Refer to ticket status fields for documentation on the required fields for editing a ticket status.

Creating a new ticket status

To create a new ticket status:

1. Under the Tickets menu, click on **Insert Status**, as shown below.



From here, you will be able to name and configure the new status. Refer to ticket status fields for documentation on the required fields for creating a new ticket status.

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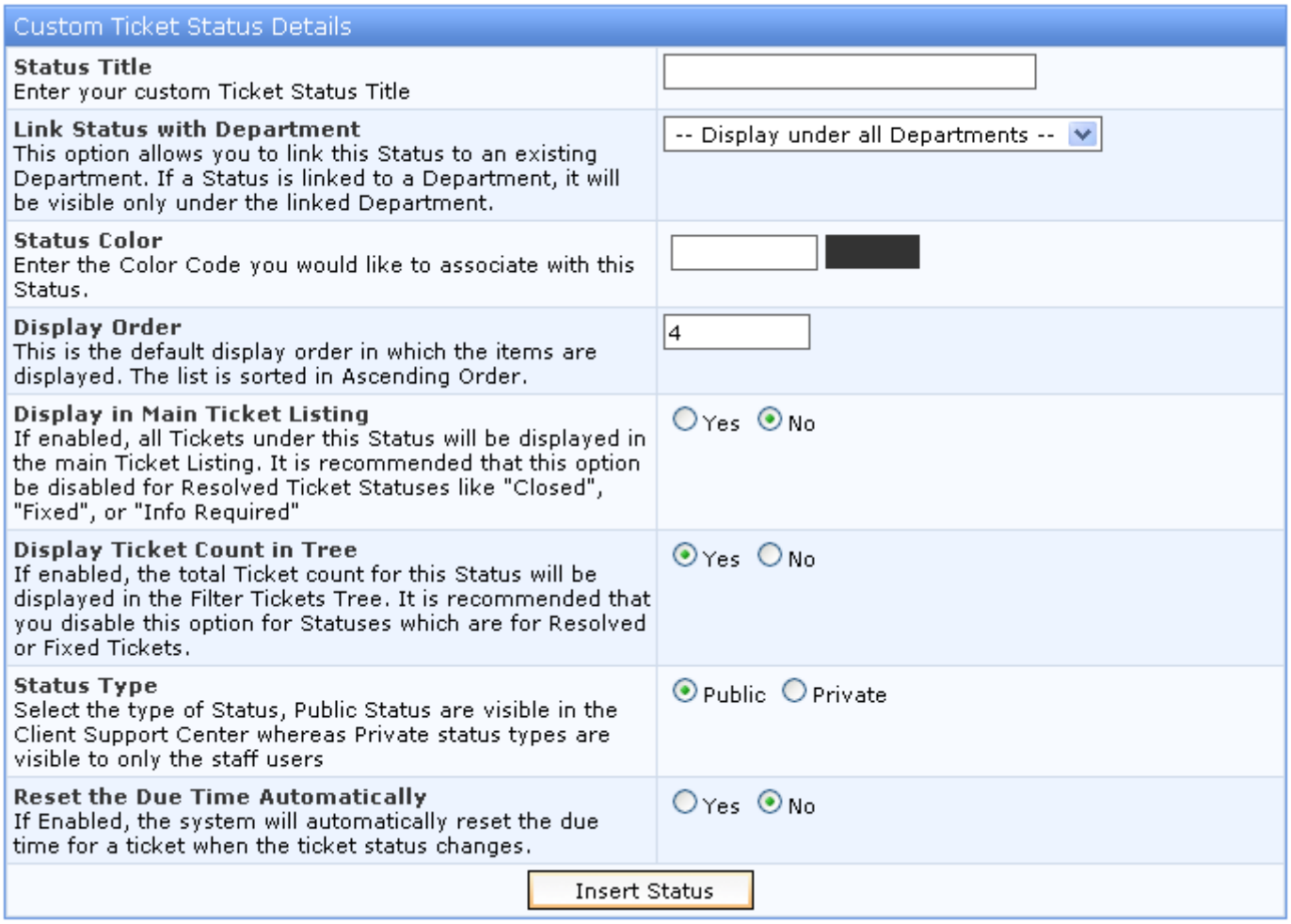
Ticket status fields


Custom Ticket Status Details
Status Title
Enter your custom Ticket Status Title
Link Status with Department
This option allows you to link this Status to an existing Department. If a Status is linked to a Department, it will be visible only under the linked Department.
-- Display under all Departments --
Status Color
Enter the Color Code you would like to associate with this Status.
Display Order
This is the default display order in which the items are displayed. The list is sorted in Ascending Order.
4
Display in Main Ticket Listing
If enabled, all Tickets under this Status will be displayed in the main Ticket Listing. It is recommended that this option be disabled for Resolved Ticket Statuses like "Closed", "Fixed", or "Info Required"
Yes
No
Display Ticket Count in Tree
If enabled, the total Ticket count for this Status will be displayed in the Filter Tickets Tree. It is recommended that you disable this option for Statuses which are for Resolved or Fixed Tickets.
Yes
No
Status Type
Select the type of Status, Public Status are visible in the Client Support Center whereas Private status types are visible to only the staff users
Public
Private
Reset the Due Time Automatically
If Enabled, the system will automatically reset the due time for a ticket when the ticket status changes.
Yes
No
Insert Status

- **Status Title** – the title of the status.
- **Link Status with Department** – if you want to have a status apply and be used under just one department, specify the department here.
- **Status Color** – the color that will be associated with a status (the color of the status title when printed in the staff control panel).
- **Display Order** – the order by which the statuses will be displayed in the staff control panel.
- **Display in Main Ticket Listing** – if enabled, all tickets set to this status will be displayed in the main ticket listing view (the view that shows "all" tickets). If disabled, the tickets set to this status will not be displayed here.
- **Display Ticket Count in Tree** – if enabled, the ticket count of how many tickets are set to this status in a department (see department and ticket tree) will show in the staff control panel.
- **Status Type** – if set to **public**, this status will be visible to users in the client support interface. Users will also be able to set tickets to this status themselves.
- **Reset the Due Time Automatically** – if a ticket is changed to this status, the due time of the ticket will be reset (according to an SLA plan or the system default due time).

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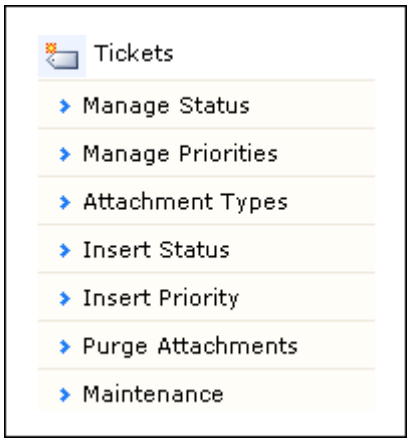
Priorities

Each ticket has a **priority**. The priority of a ticket is a way of ordering importance or urgency. By default, SupportSuite and eSupport adds the following priorities to the system:

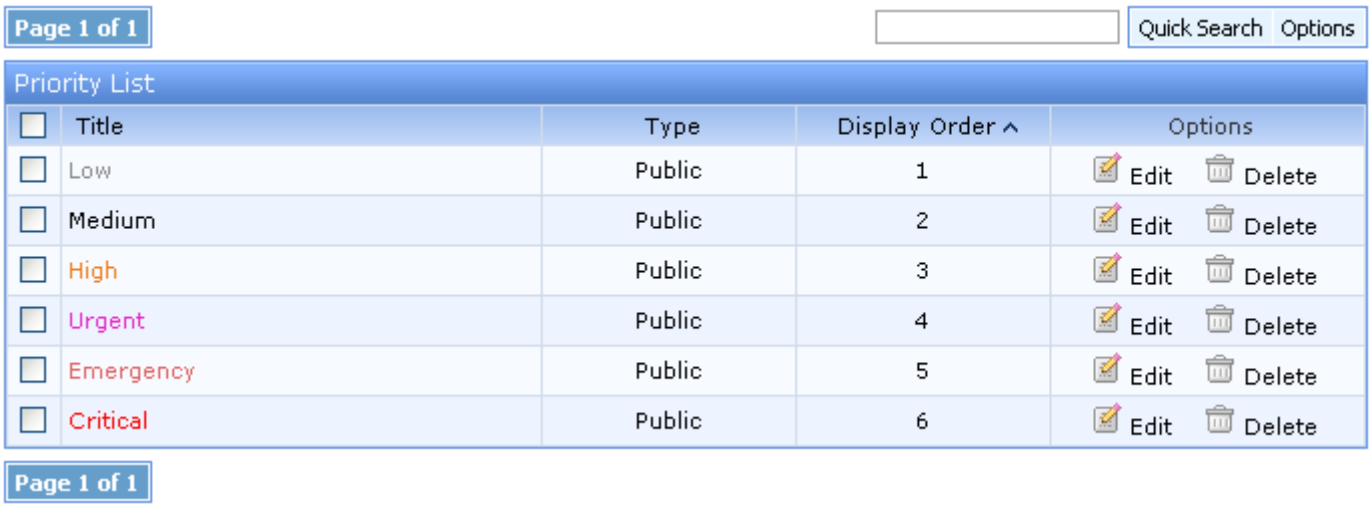
- Critical
- Emergency
- Urgent
- High
- Medium
- Low

To view and manage ticket priorities:

1. Under the Tickets menu, click on **Manage Priorities**, as shown below.



A list of all the system's ticket priorities will be shown, as below.



To **delete** a ticket priority, click on the corresponding delete icon.

Selecting multiple ticket priorities (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, priorities can be mass-deleted. Under the **Advanced Search** tab, priorities can be searched for by title. Under the **Settings** tab, the number of priorities shown per page (if there are many) can be limited.

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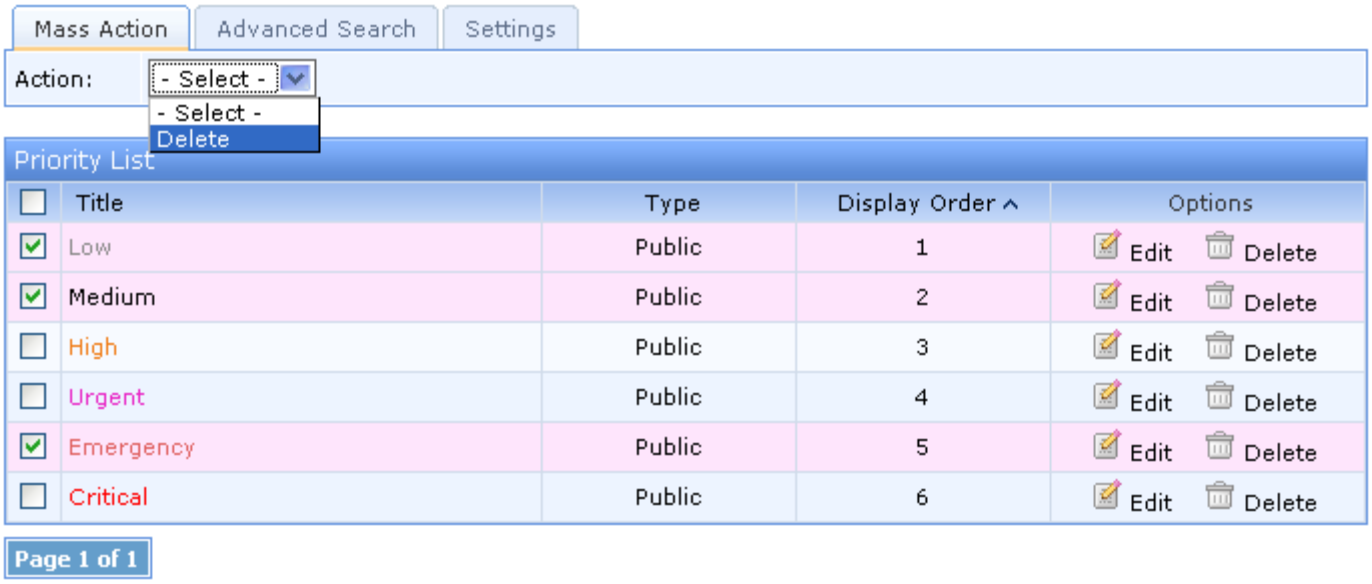


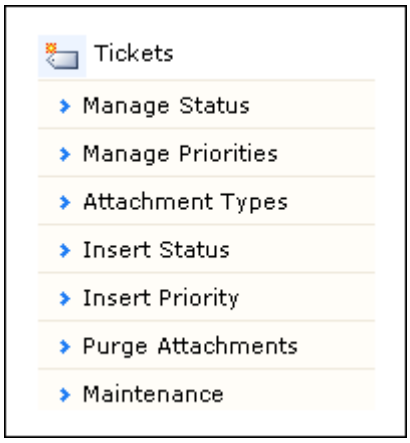
To **edit** a ticket priority, click on the corresponding edit icon. From here, you will be able to configure the selected priority.

Refer to ticket priority fields for documentation on the required fields for a editing a ticket priority.

Creating a new ticket priority

To create a new ticket priorities:

1. Under the Tickets menu, click on **Insert Priority**, as shown below.



From here, you will be able to name and configure the new priority. Refer to ticket priority fields for documentation on the required fields for a creating a new ticket priority.

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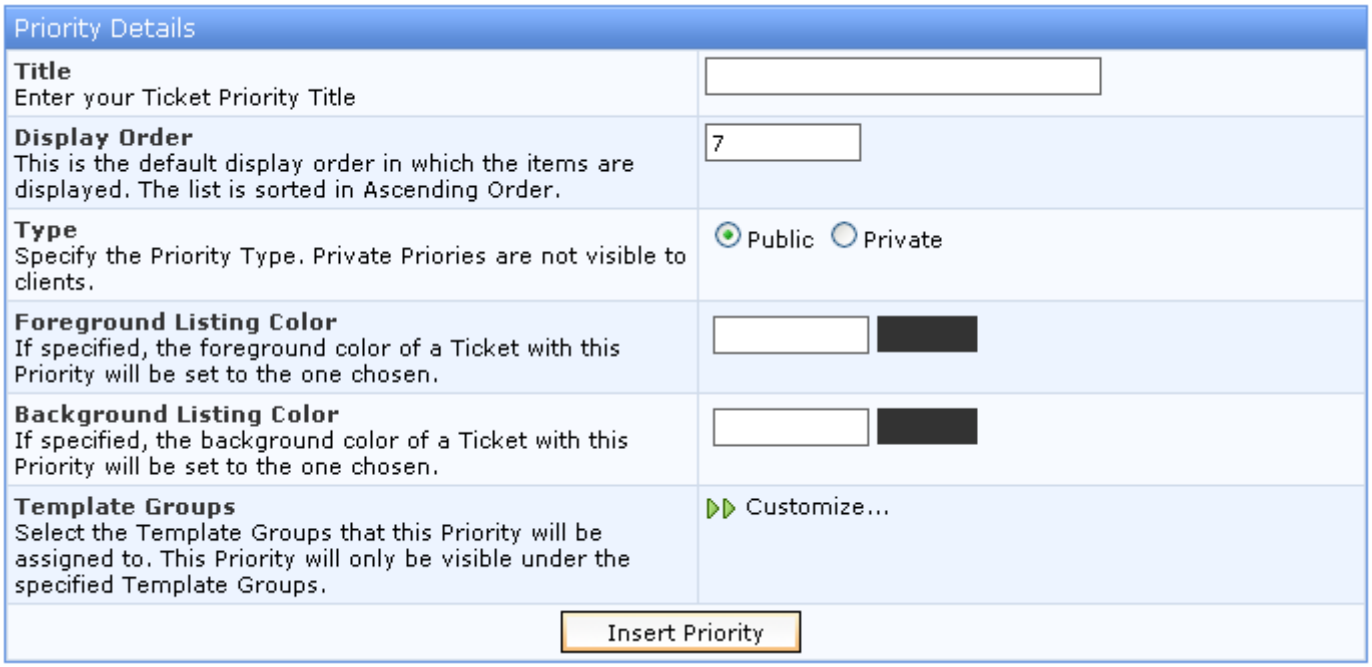
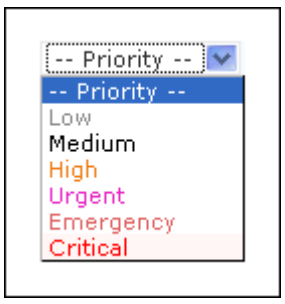
Ticket priority fields


Priority Details
Title
Enter your Ticket Priority Title
Display Order
This is the default display order in which the items are displayed. The list is sorted in Ascending Order.
7
Type
Specify the Priority Type. Private Priories are not visible to clients.
Public
Private
Foreground Listing Color
If specified, the foreground color of a Ticket with this Priority will be set to the one chosen.
Background Listing Color
If specified, the background color of a Ticket with this Priority will be set to the one chosen.
Template Groups
Select the Template Groups that this Priority will be assigned to. This Priority will only be visible under the specified Template Groups.
Customize...
Insert Priority

- **Title –** the title of the ticket priority.
- **Display Order** – the order by which priorities are ordered in the staff control panel (such as in the drop down list when selecting a priority for a ticket).
- **Type** – if set to **public**, this priority will be visible to users in the client support interface. Users will also be able to set ticket to this priority (see below for an example).
- **Foreground Listing Color** – this color is the color of the priority text, when printed in the staff control panel (see below for an example).



- **Background Listing Color** – if set, in a drop down list the priority will have this background color (see below for an example).
- **Template Groups** – priorities can be assigned to specific template groups. To assign this priority to specific template groups, click on the customize ▶▶ icon and check the boxes of the corresponding template groups.

  Template group assignments only affect the client support interface – i.e. clients creating a ticket will only be able to use the ticket priorities that are assigned to the template group the client is using. For more information on template groups, see template groups).

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Attachment types

If enabled (see ticket settings), users can upload attachments to ticket posts via the client support interface. They can also attach files to e-mails, which will be parsed and stored by the mail parser.

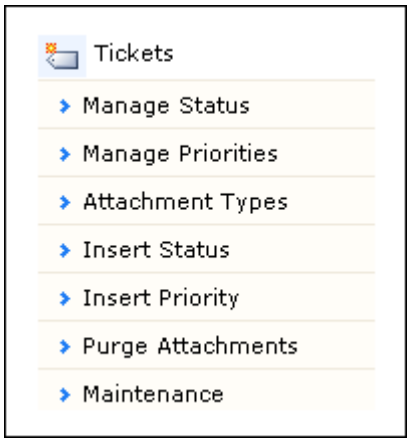
The file **types** that can be uploaded by clients or attached in an e-mail can be restricted to what is listed here, in attachment types.

In order for these settings to be applicable, you must first enable **Attachment Type Restriction** (see ticket settings). If this is not enabled, you will see the following error message on the top of the attachment types page. The size of a file can also be restricted.

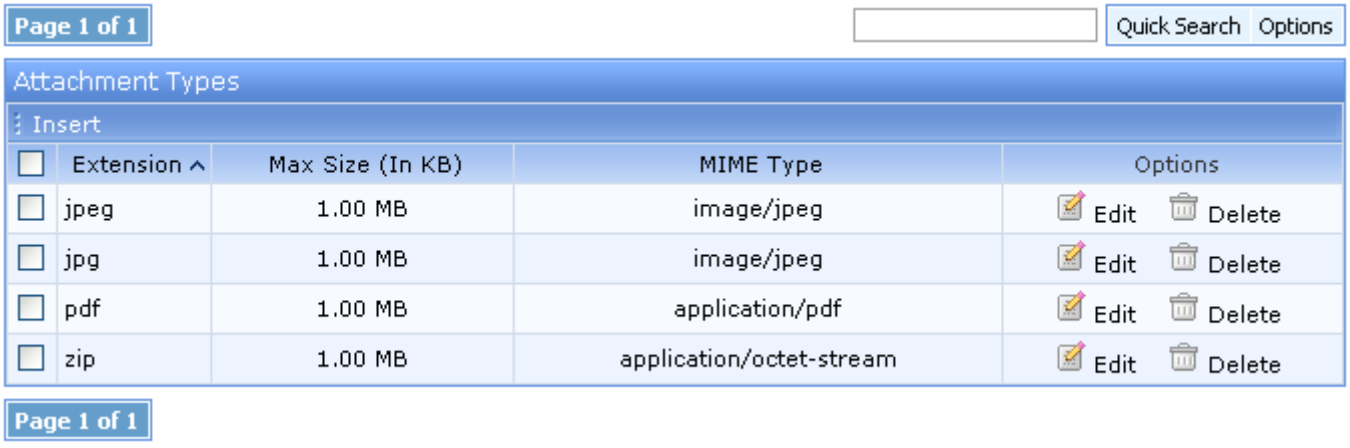
Attachment Type Restriction is not enabled under Settings. These restrictions will not work until you enable the setting under Settings > Tickets > Attachments

To view and manage the attachment types list:

1. Under the Tickets menu, click on **Attachment Types**, as shown below.



The current attachment types in the database and their respective file size restrictions will be listed, as shown below.



To **delete** an attachment type, click on the corresponding delete icon.

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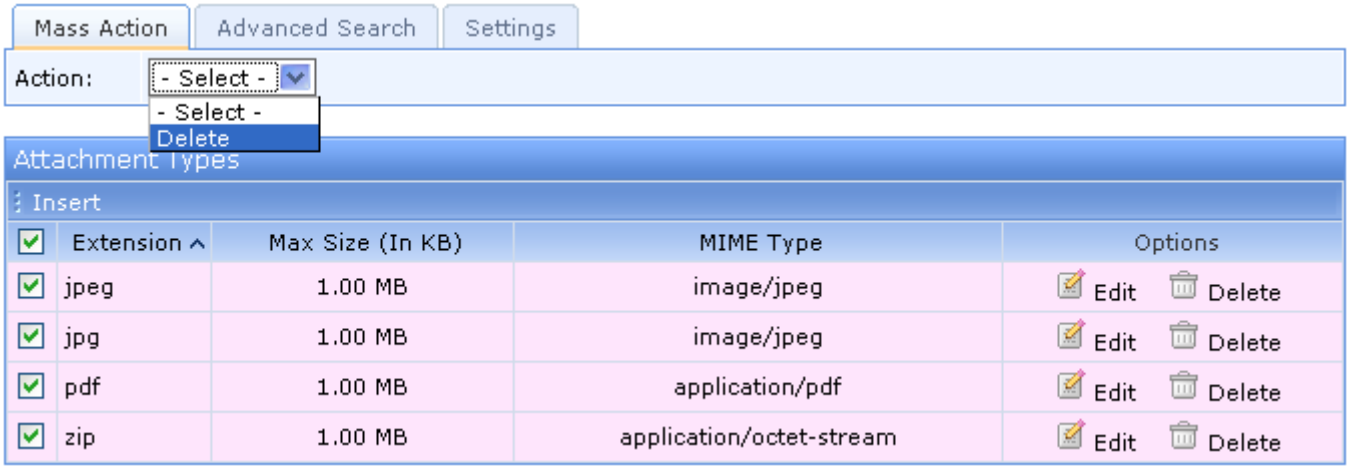
Selecting multiple attachment types (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, attachment types can be mass-deleted. Under the **Advanced Search** tab, attachment types can be searched for by title. Under the **Settings** tab, the number of attachment types shown per page (if there are many) can be limited.



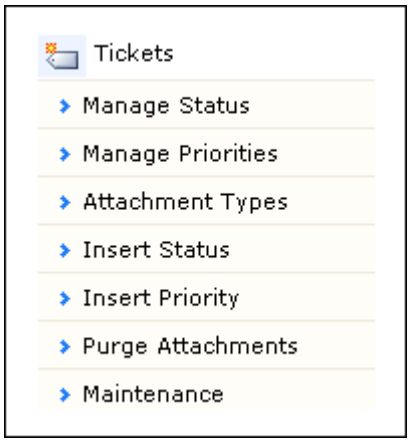
To **edit** an attachment type, click on the corresponding edit icon. From here, you will be able to configure specific settings and size restrictions for this attachment type.

This link will open an attachment type entry form. Refer to attachment type fields for documentation on the required fields for editing a attachment type.

Adding a new attachment type

To add a new attachment type:

1. Under the Tickets menu, click on **Attachment Types**, as shown below.



The current attachment types in the database and their respective file size restrictions will be listed.

Click on the **Insert** link, indicated to below.

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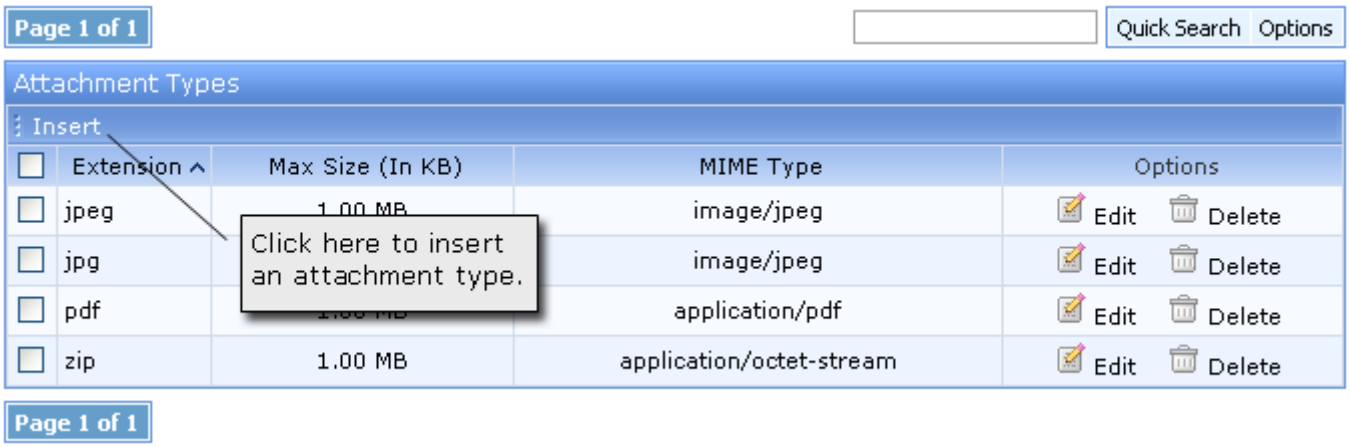
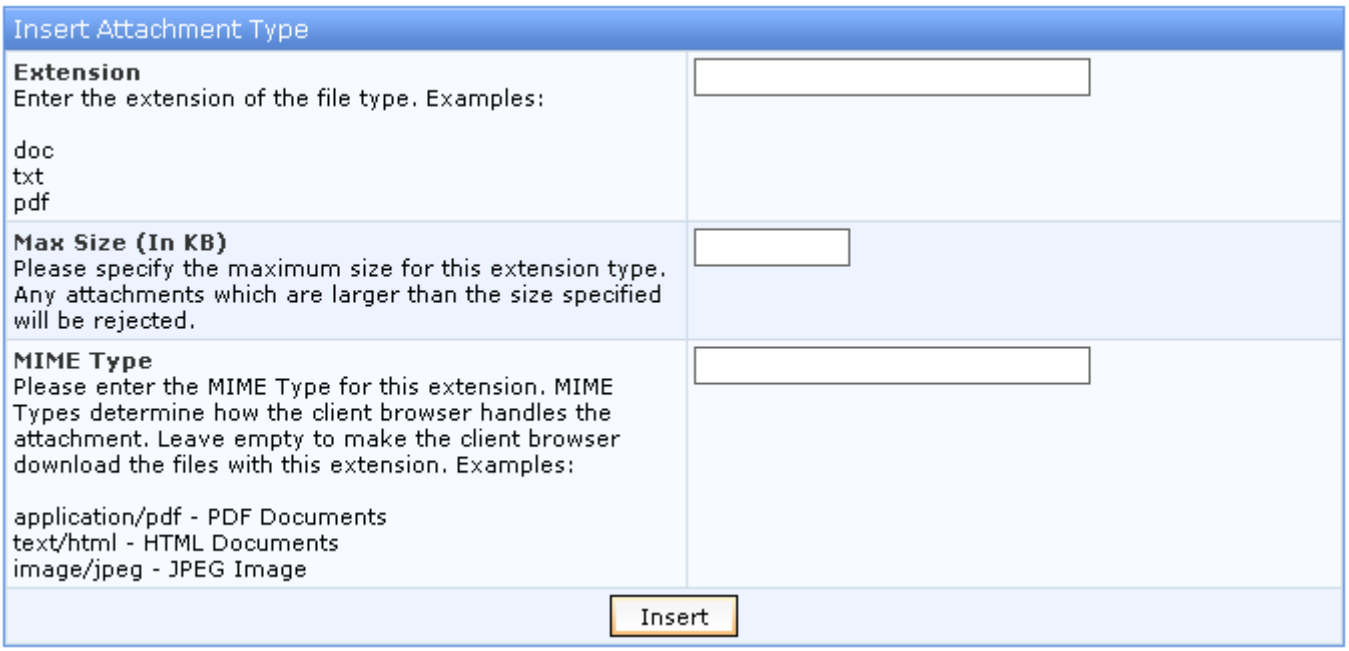


This link will open an attachment type entry form. Refer to attachment type fields for documentation on the required fields for adding a new attachment type.

Attachment type fields


Insert Attachment Type
Extension
Enter the extension of the file type. Examples:
doc
txt
pdf
Max Size (In KB)
Please specify the maximum size for this extension type. Any attachments which are larger than the size specified will be rejected.
MIME Type
Please enter the MIME Type for this extension. MIME Types determine how the client browser handles the attachment. Leave empty to make the client browser download the files with this extension. Examples:
application/pdf - PDF Documents
text/html - HTML Documents
image/jpeg - JPEG Image
Insert

- **Extension** – if you wanted to accept ZIP files (for example), you would enter **zip** in this field (without a preceeding dot).
- **Max Size (In KB)** – the maximum size of this file type that the mail parser will accept. If above this size, the attachment will be rejected (if being uploaded via the client support interface) or will simply be dropped if coming in as an e-mail. This is measured in **Kilobytes**, where 1024 Kilobytes (KB) is equal to 1 Megabyte (MB).
- **MIME Type** – the MIME (Multipurpose Internet Mail Extensions) type here tells the internet browser how to handle this attachment (when clicked on, for example, in the staff control panel). An example application of this is if a MIME type is specified for a PDF file, the PDF may open in Adobe Acrobat Reader's internet browser integrated reader, because the browser know how to handle the MIME type. This can be left blank.

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- For a comprehensive list of standardized MIME types, see www.iana.org/assignments/media-types.

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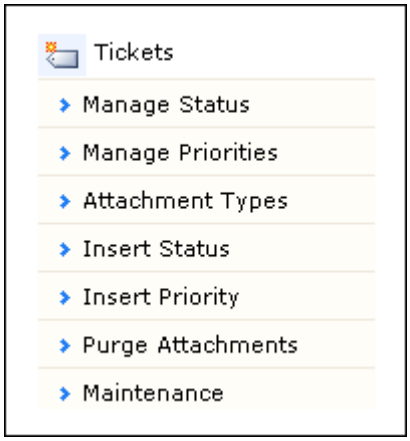
Purging attachments

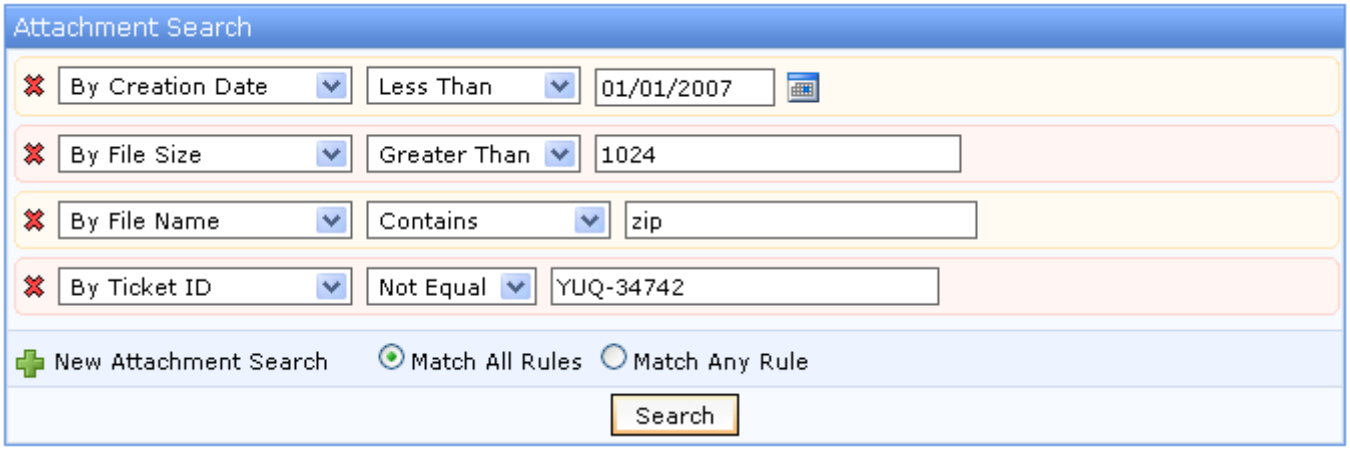
In order to save database space or file space (depending on your storage method for attachments (see ticket settings)), attachments can be purged. This utility allows you to search for attachments that match one or a set of file criteria.

To purge ticket file attachments:

1. Under the Tickets menu, click on **Purge Attachments**, as shown below.



You will be presented with a search and criteria builder form, as shown below.



- **By Creation Date** – you can define a creation date for a file. In the example above, the criteria is "Any file that was created before 01/01/2007".
- **By File Size** – you can define a file size (in Kilobytes, where 1024 Kilobytes is equal to 1 Megabyte). In the example above, the criteria is "Any file that has a file size that is larger than 1024 KB".
- **By File Name** – you can define a string that the search engine can search file names for (including their extension). In the example above, the criteria is "Any file that contains the string 'zip'".
- **By Ticket ID** – a ticket ID can be specified here. In the example above, the criteria is "Any file that is not found in ticket YUQ-34742" – i.e. we want to **preserve** the attachments in this ticket.

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To add a new matching field, click on the new criteria icon. You must also set the **type of matching** to be performed.

If set to **match all criteria**, the parser rule will only "match" a file if all of the criteria fields are true for that ticket (**AND** logic). If set to **match any criteria**, only one of the criteria fields need to be true for this parser rule to "match" a file (**OR** logic).

To list **all** files, simply click on the **search** button without entering any criteria.

Clicking on the **Search** button will not purge your attachments – it will simply list the matched files, as shown below.

Attachments Table

	Attachment ID	Ticket ID	File Size	File name
☐	1	UZO-924368	0.00 KB	Document1.txt
☐	2	HYT-686576	236.85 KB	Content Box.psd
☐	3	MMZ-783203	50.50 KB	Criticals.doc

Purge Attatchments

To purge attachments, check the corresponding check boxes and click on the **Purge Attachments** button.

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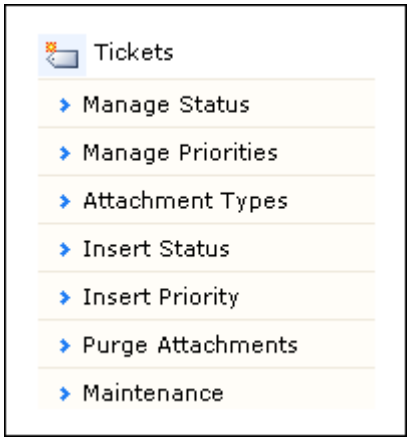
Maintenance

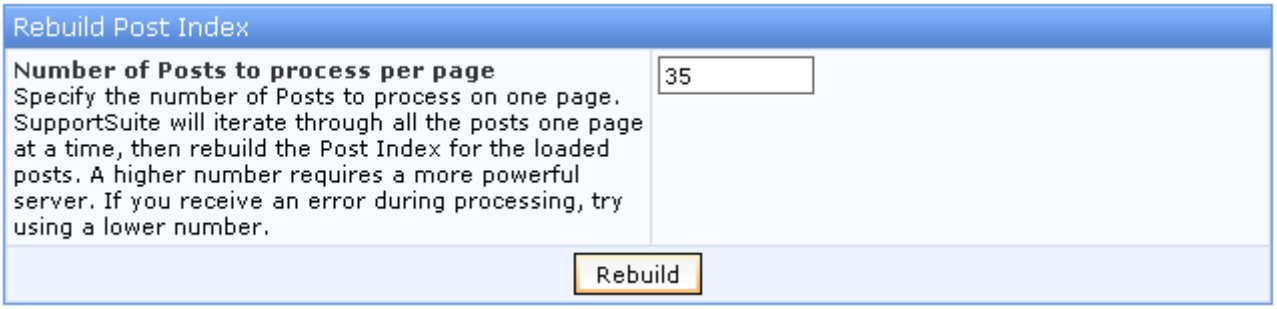
The ticket maintenance area of the administrator control panel allows you to rebuild the post index. Every word in ticket replies (that are covered by the search indexer criteria set in ticket settings) is stored in the database to allow for fast and relevant searching of tickets (see searching tickets in the staff control panel).

It may be the case that you need to rebuild this post index, and reparse every ticket post stored in the database (for example, after importing ticket data from a third party system or after a database restoration).

To perform ticket maintenance:

1. Under the Tickets menu, click on **Maintenance**, as shown below.




Rebuild Post Index
Number of Posts to process per page
Specify the number of Posts to process on one page. SupportSuite will iterate through all the posts one page at a time, then rebuild the Post Index for the loaded posts. A higher number requires a more powerful server. If you receive an error during processing, try using a lower number.
35
Rebuild

- **Number of Posts to Process Per Page -** Specify the number of posts that the system should process on one page in the adjacent text box.

Before proceeding, make sure you disable any **popup blockers**.

Click on the **Rebuild** button to start the rebuild. Once started, you must allow the rebuild to complete or your search functionality in the staff control panel may not work correctly.

A window similar to the one shown below will appear and will begin refreshing. With every refresh, a new batch of ticket parsing will have started.

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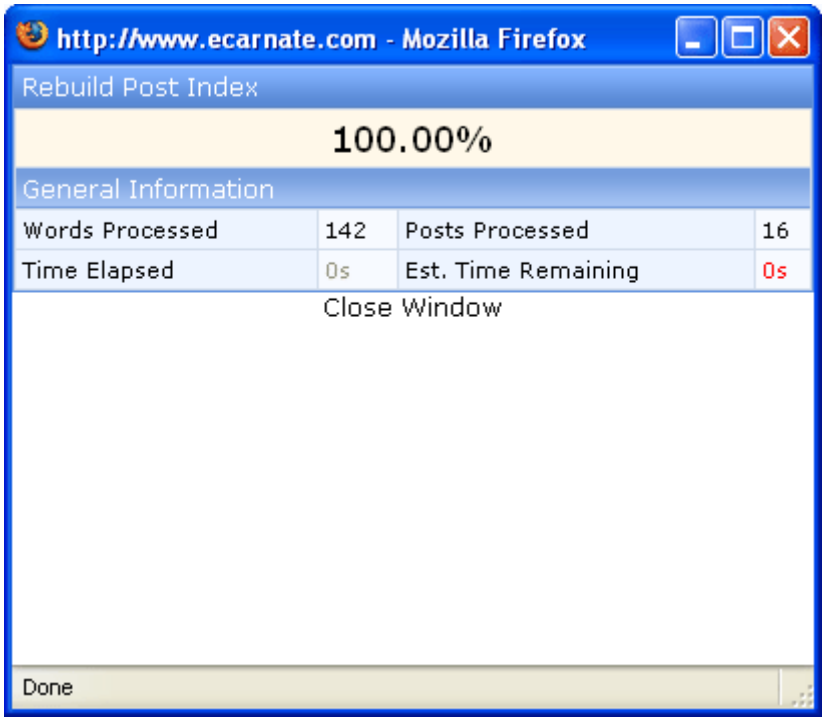

If you receive an error during processing (such as a time out error, or page cannot be displayed error) then try using a lower number for the *Number of Posts to Process Per Page*. Since the process is resource intensive, you will require a powerful server to process a higher number of posts in one batch.

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SLA

An SLA (Service Level Agreement) is an agreement to meet targets or simply a set of targets you have for giving support to your clients.

For example, an SLA plan created in SupportSuite or eSupport your **Sales** department might state that a ticket must be replied to within **2 hours** during a set of **specified working hours** (known as a schedule), otherwise it will be **marked as overdue**.

An SLA plan is associated with a **schedule**. When a ticket has been assigned an SLA plan in some way, the time "counter" that counts how many hours the ticket has not had a reply for will only run during the **schedule hours** associated with the ticket's SLA plan. This allows you to run effective 'opening hours' (we refer to them as schedules) of different types, ensuring that tickets do not get submitted out of your opening hours and run overdue.

SLA plans in SupportSuite and eSupport provide a powerful and effective mechanism by which you can make sure you and your desk staff maintain certain support standards for certain clients across a department or set of departments. They can also be combine with escalation rules (see escalations) to escalate in some way when becoming overdue (such as moving department, changing priority, changing status or assigning to a specific staff user and so on).

An SLA plan can be assigned to a **user account**, to a specific **ticket** or apply to an entire **department**. A plan can also be specific to a group of ticket priorities and statuses. Within a department. Mail parser rules (see mail parser) can also be used to assign an incoming ticket or ticket reply a certain SLA plan.

In order to implement an SLA plan, you must first set up your schedules (see schedules).

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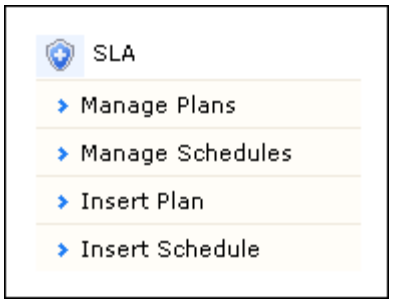
Schedules

A schedule can be thought of as **opening hours**. You can create multiple schedules for different purposes – such as 'Support Department Hours' and 'Sales Department Hours'. A schedule is then assigned to an SLA plan.

When a ticket has been assigned an SLA plan in some way, the time "counter" that counts how many hours the ticket has not had a reply for will only run during the **schedule hours** associated with the ticket's SLA plan. This allows you to run effective 'opening hours' (we refer to them as schedules) of different types, ensuring that tickets do not get submitted out of your opening hours and run overdue.

To view and manage schedules:

1. Click on **Manage Schedules** under the SLA menu, as shown below.



You will be presented with a list of all the schedules currently set up for your SupportSuite or eSupport installation, as shown below.

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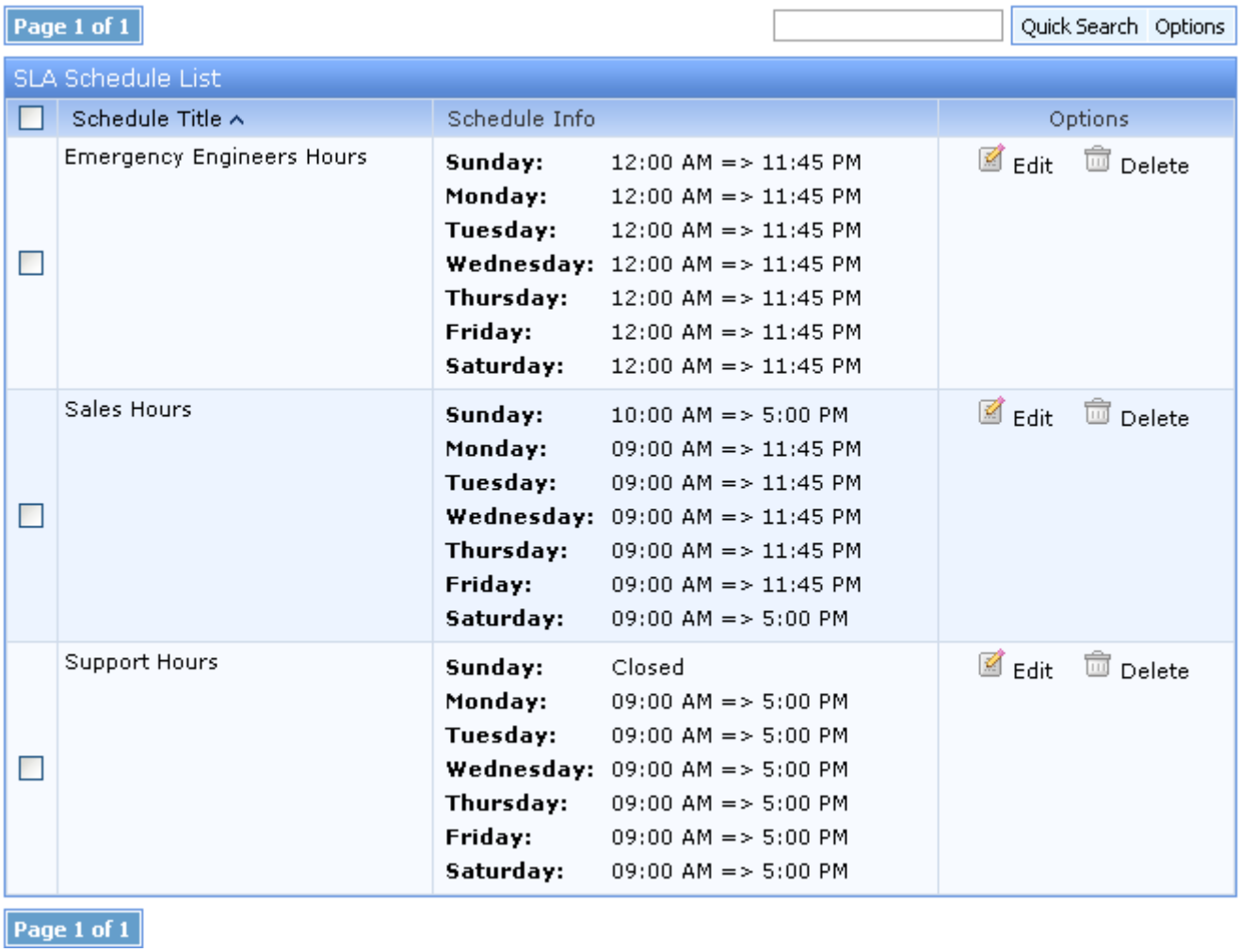
Page 1 of 1
Quick Search
Options
SLA Schedule List
Schedule Title
Schedule Info
Options
Emergency Engineers Hours
Sunday: 12:00 AM => 11:45 PM
Monday: 12:00 AM => 11:45 PM
Tuesday: 12:00 AM => 11:45 PM
Wednesday: 12:00 AM => 11:45 PM
Thursday: 12:00 AM => 11:45 PM
Friday: 12:00 AM => 11:45 PM
Saturday: 12:00 AM => 11:45 PM
Edit
Delete
Sales Hours
Sunday: 10:00 AM => 5:00 PM
Monday: 09:00 AM => 11:45 PM
Tuesday: 09:00 AM => 11:45 PM
Wednesday: 09:00 AM => 11:45 PM
Thursday: 09:00 AM => 11:45 PM
Friday: 09:00 AM => 11:45 PM
Saturday: 09:00 AM => 5:00 PM
Edit
Delete
Support Hours
Sunday: Closed
Monday: 09:00 AM => 5:00 PM
Tuesday: 09:00 AM => 5:00 PM
Wednesday: 09:00 AM => 5:00 PM
Thursday: 09:00 AM => 5:00 PM
Friday: 09:00 AM => 5:00 PM
Saturday: 09:00 AM => 5:00 PM
Edit
Delete
Page 1 of 1

To **delete** a schedule, click on the corresponding delete icon.

Selecting multiple schedules (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, schedules can be mass-deleted. Under the **Advanced Search** tab, schedules can be searched for by title. Under the **Settings** tab, the number of schedules shown per page (if there are many) can be limited.

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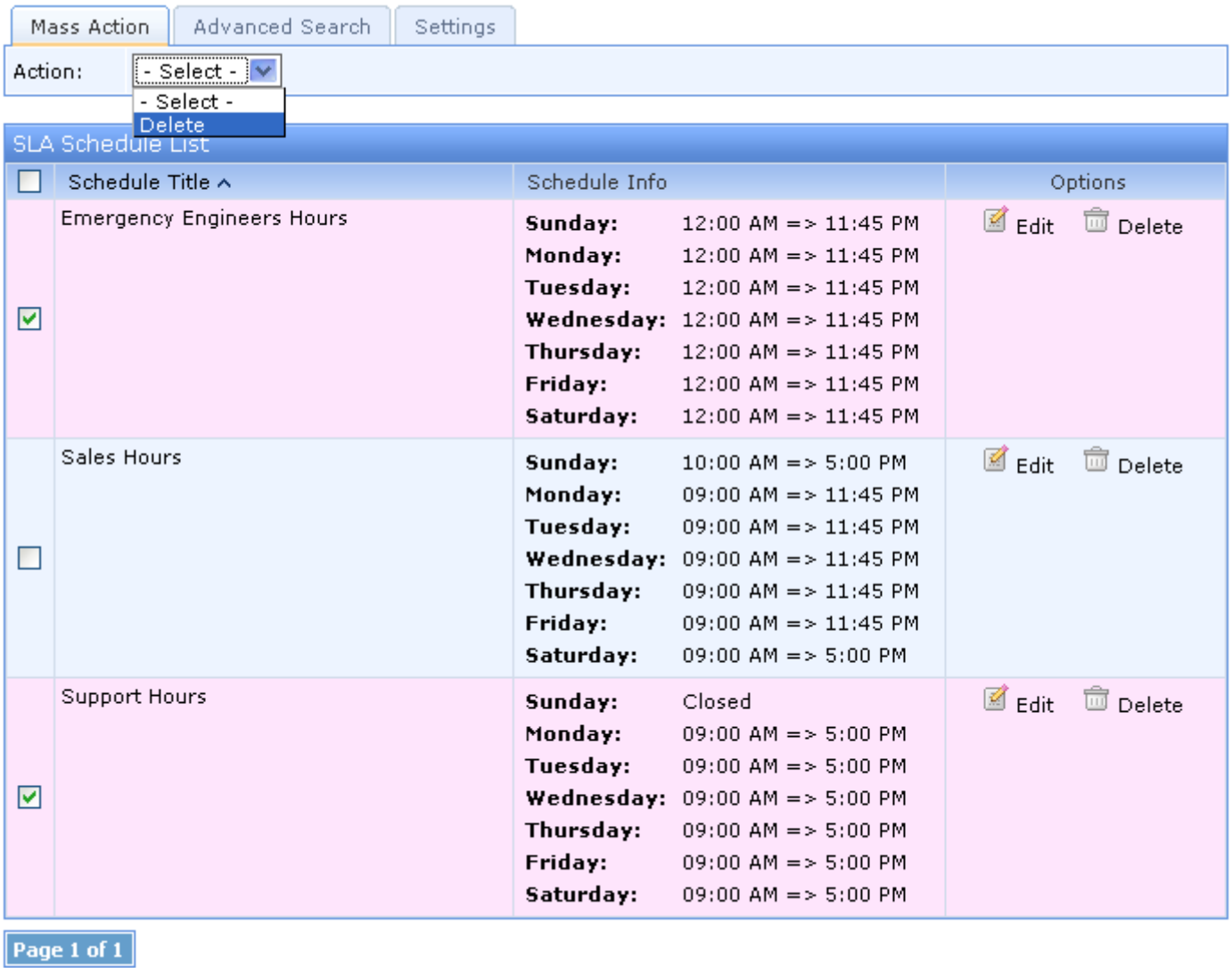


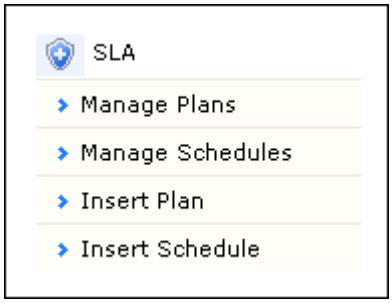
To **edit** a schedule, click on the corresponding edit icon. From here, you are able to specify the hours for the schedule you are editing.

Refer to schedule fields for documentation on the required fields for editing a schedule.

Creating a new schedule

To create a new schedule:

1. Click on **Insert Schedule** under the SLA menu, as shown below.



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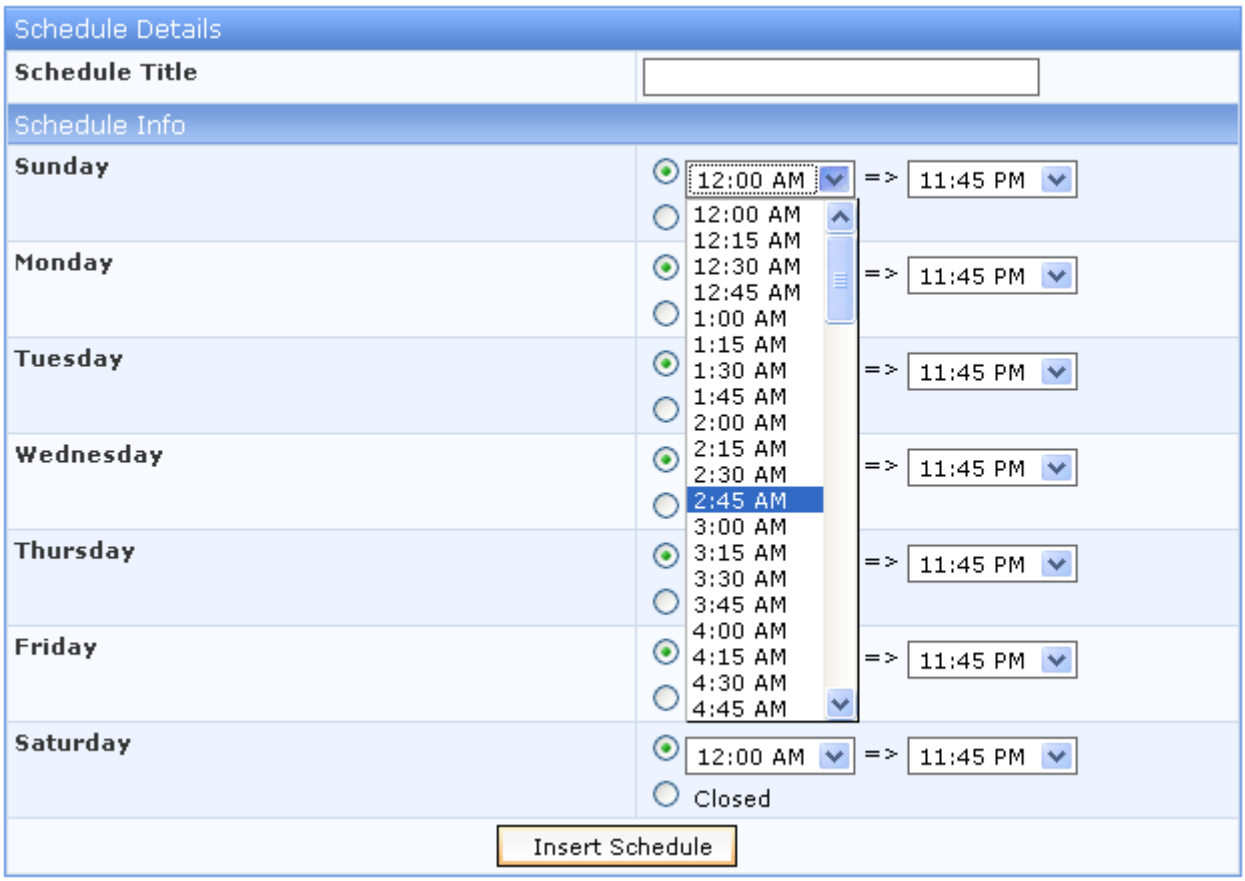
From here, you are able to specify the hours for the schedule you are editing. Refer to schedule fields for documentation on the required fields for creating a new schedule.

Schedule fields



- **Schedule Title** – the title of this schedule.
- **Schedule Hours** – specify the duration of "open" hours each day. The schedule shown above is equivalent to a 24-hour day schedule.

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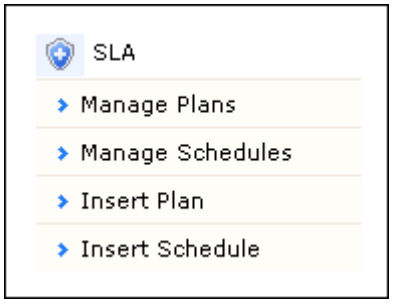
Plans

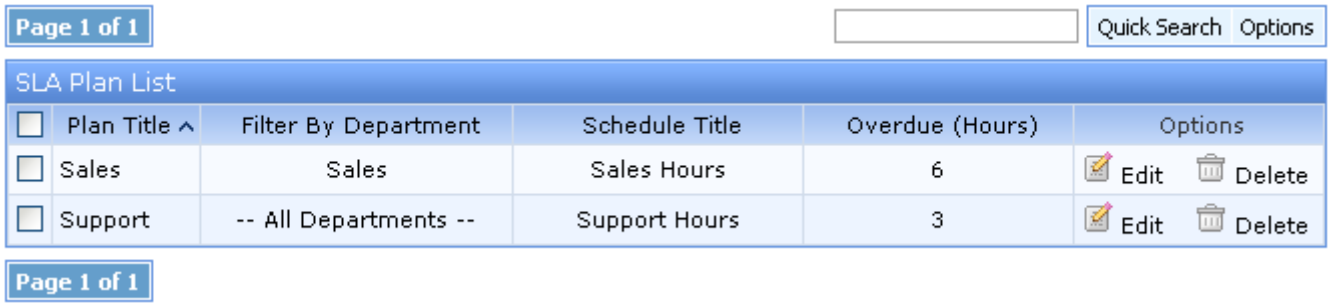
An SLA plan is associated with a schedule (see schedules). You must first create a schedule before creating an SLA plan. The purpose of an SLA plan is to ensure that tickets are handled within a given time during 'open' hours (specified in a schedule). For more information, read the SLA introduction (see SLA).

To view and manage plans currently implemented on your system:

1. Click on **Manage Plans** under the SLA menu, as shown below.

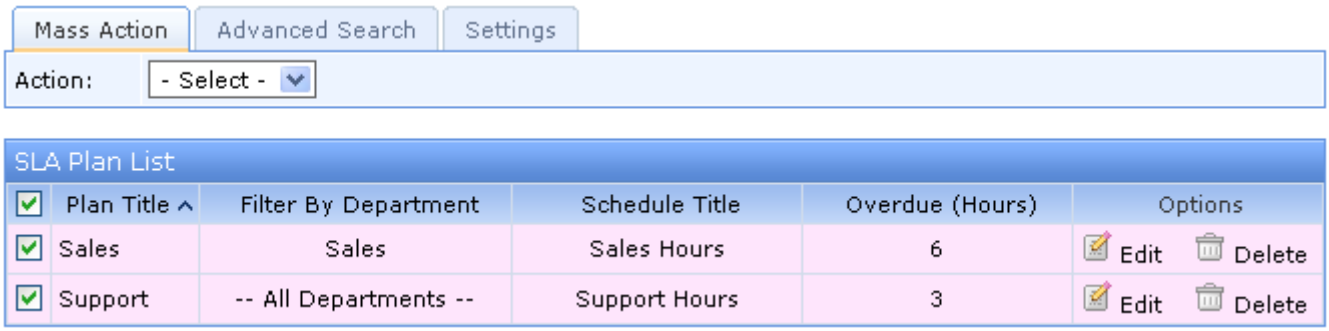


You will be presented with a list of all of the SLA plans available for implementation, as shown below.



To **delete** a plan, click on the corresponding delete icon.

Selecting multiple plans (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, plans can be mass-deleted. Under the **Advanced Search** tab, schedules can be plans for by title. Under the **Settings** tab, the number of plans shown per page (if there are many) can be limited.



To **edit** an SLA plan, click on the corresponding edit icon. You will be presented with all of the configurable fields for this plan.

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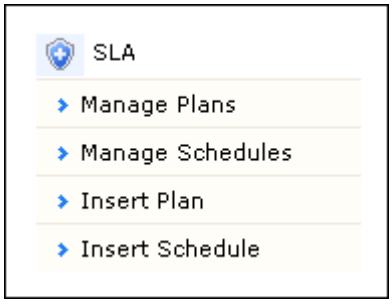
Refer to SLA plan fields for documentation on the required fields for an SLA plan.

Creating a new SLA plan

To create a new SLA plan:

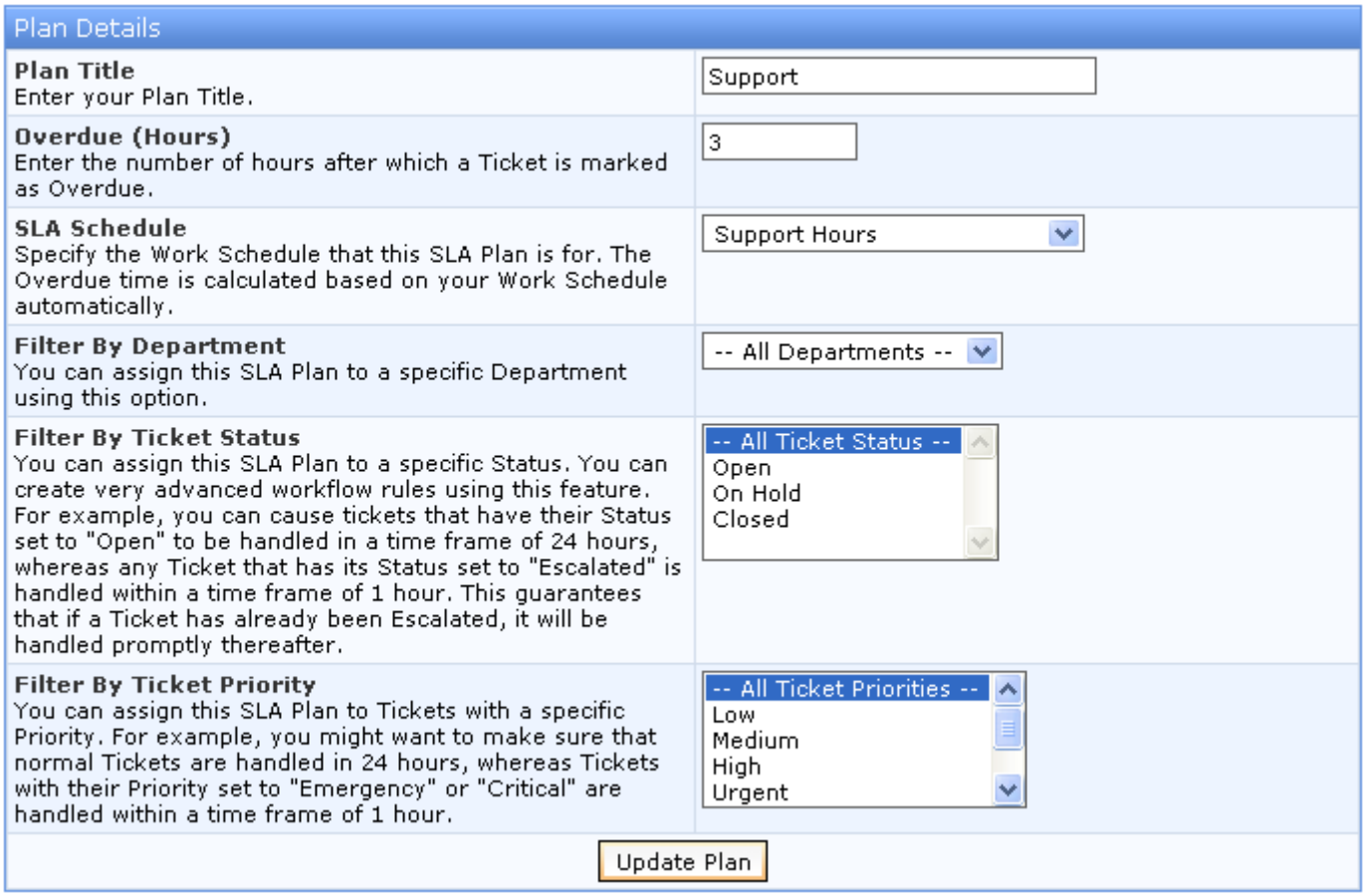
1. Click on **Insert Plan** under the SLA menu, as shown below.



You will be presented with all of the configurable fields for this plan.

Refer to SLA plan fields for documentation on the required fields for creating a new SLA plan.

SLA plan fields


Plan Details
Plan Title
Enter your Plan Title.
Support
Overdue (Hours)
Enter the number of hours after which a Ticket is marked as Overdue.
3
SLA Schedule
Specify the Work Schedule that this SLA Plan is for. The Overdue time is calculated based on your Work Schedule automatically.
Support Hours
Filter By Department
You can assign this SLA Plan to a specific Department using this option.
-- All Departments --
Filter By Ticket Status
You can assign this SLA Plan to a specific Status. You can create very advanced workflow rules using this feature. For example, you can cause tickets that have their Status set to "Open" to be handled in a time frame of 24 hours, whereas any Ticket that has its Status set to "Escalated" is handled within a time frame of 1 hour. This guarantees that if a Ticket has already been Escalated, it will be handled promptly thereafter.
-- All Ticket Status --
Open
On Hold
Closed
Filter By Ticket Priority
You can assign this SLA Plan to Tickets with a specific Priority. For example, you might want to make sure that normal Tickets are handled in 24 hours, whereas Tickets with their Priority set to "Emergency" or "Critical" are handled within a time frame of 1 hour.
-- All Ticket Priorities --
Low
Medium
High
Urgent
Update Plan

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- **Plan Title** – a title for the SLA plan.
- **Overdue (Hours)** – the time after which (in hours) a ticket that has not been replied to be a staff user is to be marked as overdue.
- **SLA Schedule** – what schedule is to be associated with this SLA plan. For more information on schedules, see schedules.
- **Filter By Department** – if you wish for this SLA plan to cover only a specific department, specify the department here. Otherwise, set this to **All Departments**.
- **Filter By Ticket Status** – if you wish for this SLA plan to only affect tickets set to specific statuses for the department (set in *Filter By Department*), specify the statuses here.
- **Filter By Ticket Priority** – if you wish for this SLA plan to affect tickets of a certain priorities, set the priorities here.

Note that if you add more ticket statuses or more ticket priorities to the system, they will not be automatically set here **even if** you specify "All Ticket Statuses" or "All Ticket Priorities" and so on.

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Escalation rules

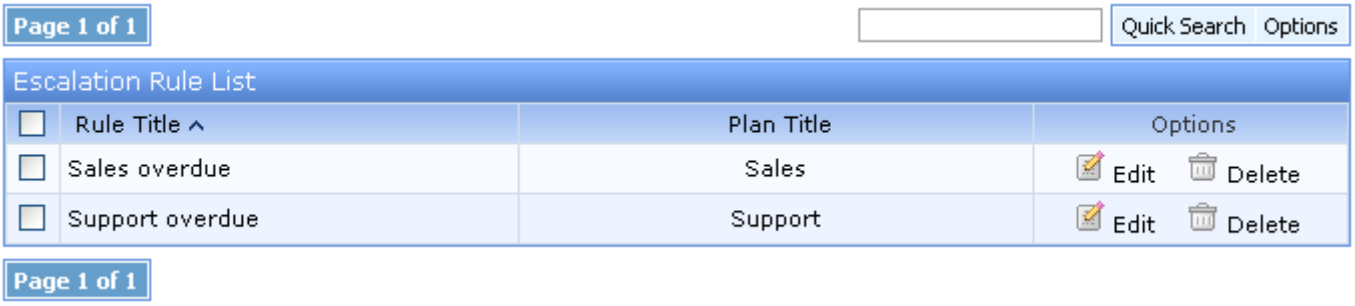
Escalation rules (if defined) come into effect when a ticket gets marked as overdue under a certain SLA plan. Escalations rules can be used to perform a set of specified actions when this event occurs – such as assigning the ticket to a staff member or moving the ticket's department.

For example, an escalation rule could be used to assign the ticket to a **support team leader** if it becomes marked as overdue, so it receives immediate attention from a superior.

To view and manage escalation rules:

1. Click on **Manage Rules** under the Escalations menu, as shown below.

You will be presented with a list of all of the currently active escalation rules, as shown below.



To **delete** an escalation rule, click on the corresponding delete icon.

Selecting multiple rules (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, rules can be mass-deleted. Under the **Advanced Search** tab, rules can be searched for by title. Under the **Settings** tab, the number of rules shown per page (if there are many) can be limited.

To **edit** an escalation rule, click on the corresponding edit icon.

Refer to escalation rule fields for documentation on the required fields an escalation rule.

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Creating a new escalation rule

To create a new escalation rule:

1. Click on **Insert New Rule** under the Escalations menu, as shown below.

From here, you can edit the SLA plan to which the rule is executed for and what actions will be performed.

Refer to escalation rule fields for documentation on the required fields for a creating a new escalation rule.

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Escalation rule fields

From here, you can edit the SLA plan to which the rule is executed for and what actions will be performed.

Escalation Rule Details

- **Rule Title** – a title for this escalation rule.
- **SLA Plan** – the plan to which this rule is assigned. This rule will only be executed for tickets that go overdue according to the SLA plan set here.

Actions
The actions that will be performed when this rule is executed.

- **Assign to Staff** – assign the ticket to a staff member specified here.
- **Move to Department** – move the ticket to another department.
- **Change Priority** – change the priority of the ticket to the priority specified here.
- **Change Ticket Status** – change the ticket's status to the status set here.

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Teamwork

The teamwork module SupportSuite, eSupport and LiveResponse use **statuses**, **priorities**, **labels** and **categories**. These properties are proprietary in that if you use the Kayako SyncWorks application for Microsoft Office Outlook, these properties for a teamwork item (contact, event or tasks) will not be synchronized but are instead internal to the system.

The teamwork area of the administrator control panel allows you to define custom **statuses**, **priorities**, **labels** and **categories** for use in the teamwork area of the staff control panel (for more information, see teamwork in the staff control panel).

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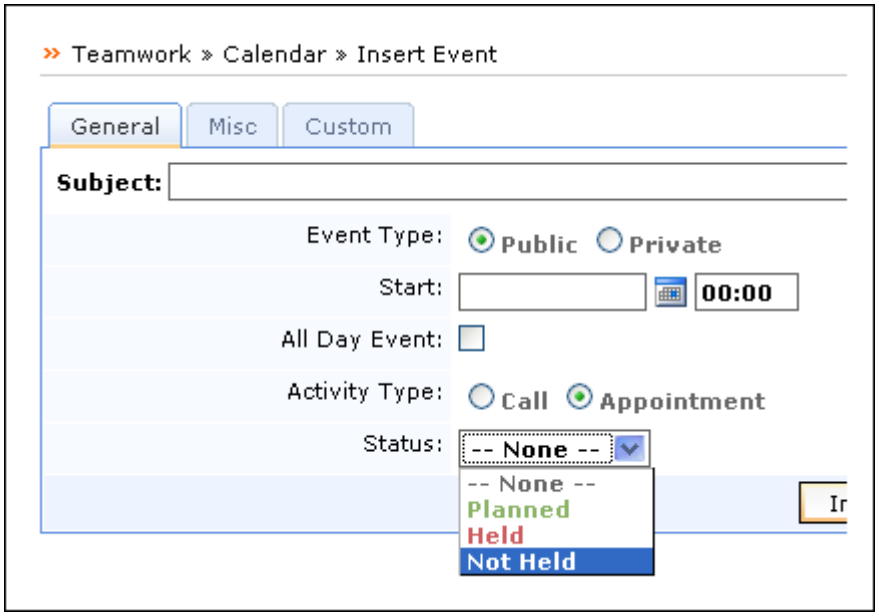
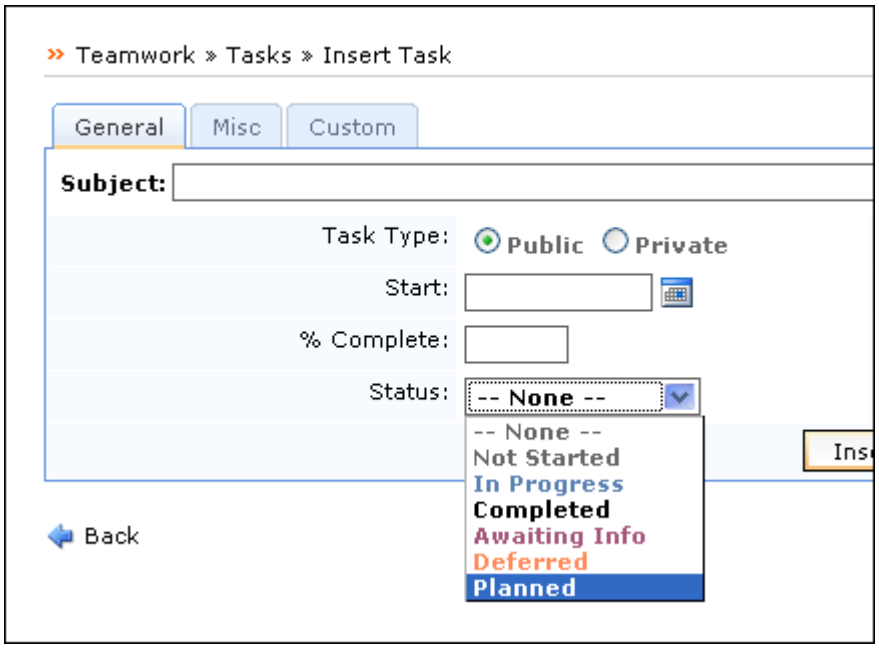
Managing teamwork statuses

A status can be used in a **task** or an **event** (appointment), as shown below.





To view and manage statuses:

1. Click on **Manage Status** under the Teamwork menu, as shown below.

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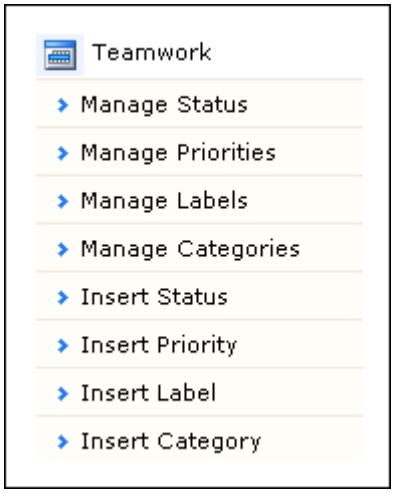
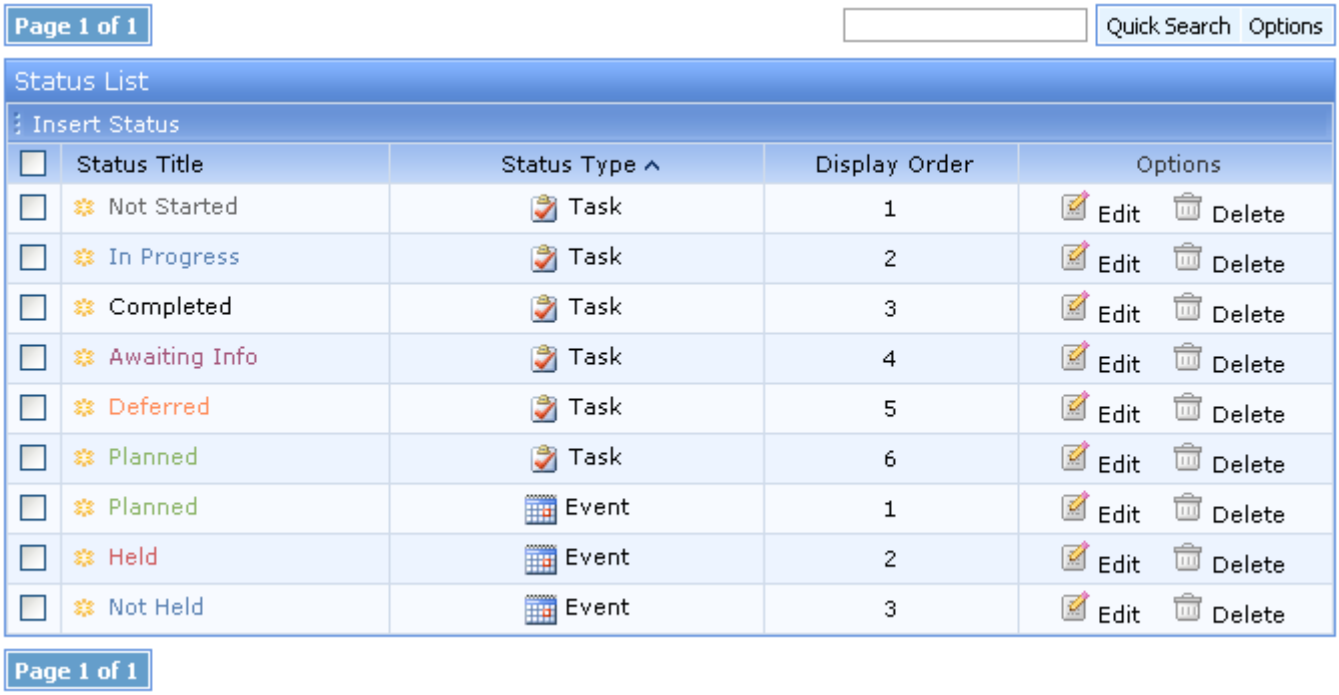


A list of all of the statuses available for teamwork data types will be listed, as shown below.



To **delete** a status, click on the corresponding delete icon.

Selecting multiple statuses (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, statuses can be mass-deleted. Under the **Advanced Search** tab, statuses can be searched for by title. Under the **Settings** tab, the number of statuses shown per page (if there are many) can be limited.

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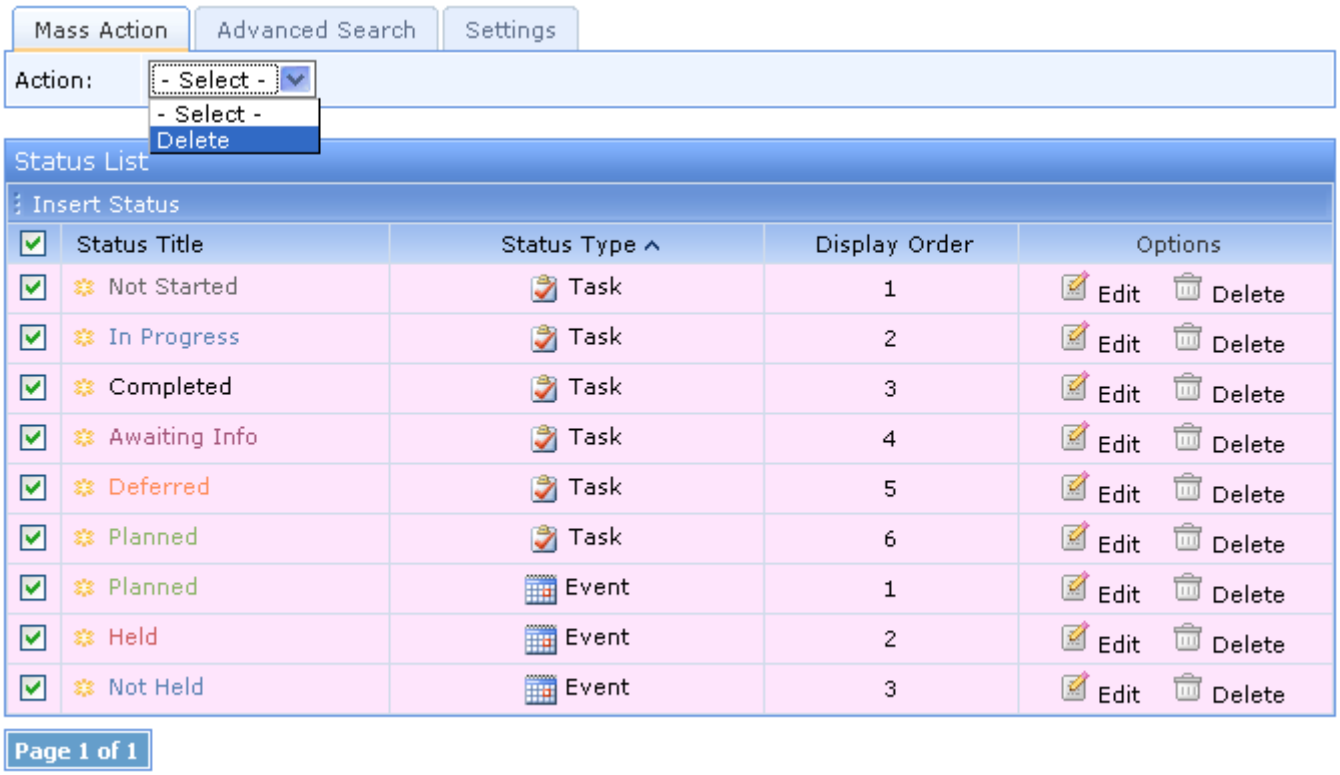


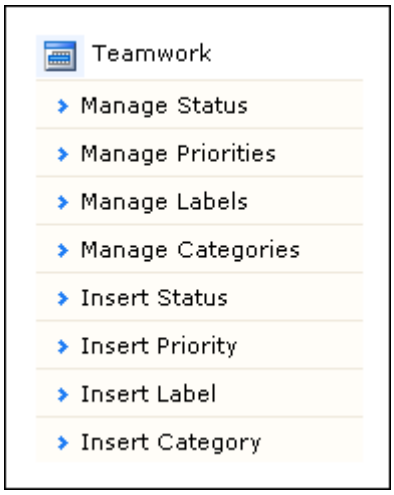
To **edit** a status, click on the corresponding edit icon. From here you can configure the properties of the selected status.

Refer to teamwork status fields for documentation on the required fields for editing a status.

Creating a new teamwork status

To create a new teamwork status:

1. Click on **Insert Status** under the Teamwork menu, as shown below.



From here you can configure the properties of the new status. Refer to teamwork status fields for documentation on the required fields for creating a new status.

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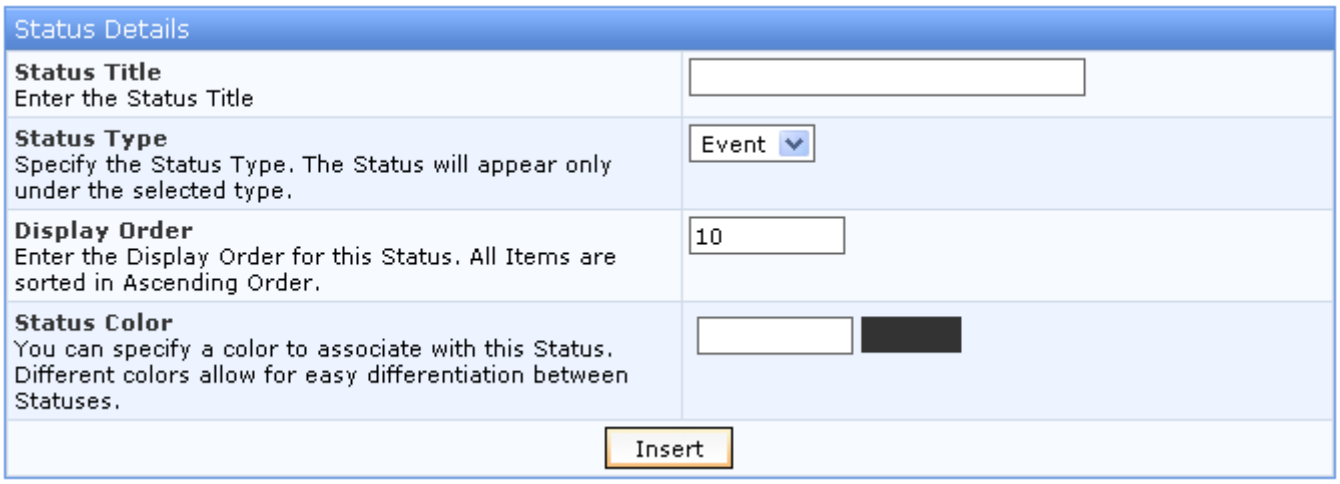
Teamwork status fields


Status Details
Status Title
Enter the Status Title
Status Type
Specify the Status Type. The Status will appear only under the selected type.
Event
Display Order
Enter the Display Order for this Status. All Items are sorted in Ascending Order.
10
Status Color
You can specify a color to associate with this Status. Different colors allow for easy differentiation between Statuses.
Insert

- **Status Title** – a title for this status.
- **Status Type** – for what type of teamwork data item will this status apply to and be available for?
- **Display Order** – the order by with statuses are displayed in the staff control panel.
- **Status Color** – a color can be set for the status. This is used as the text color for whenever this status is printed in the staff control panel.

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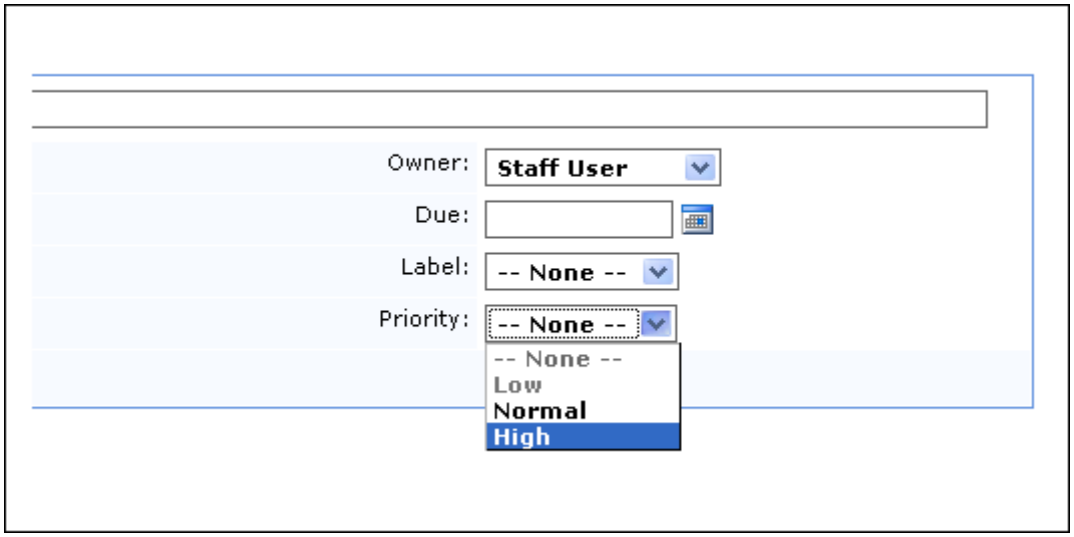
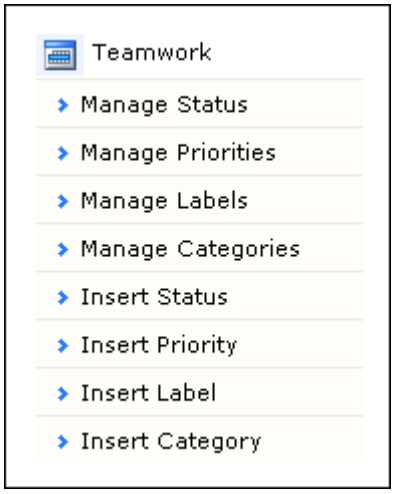
Managing teamwork priorities

A priority can be used in a **task**, as shown below.

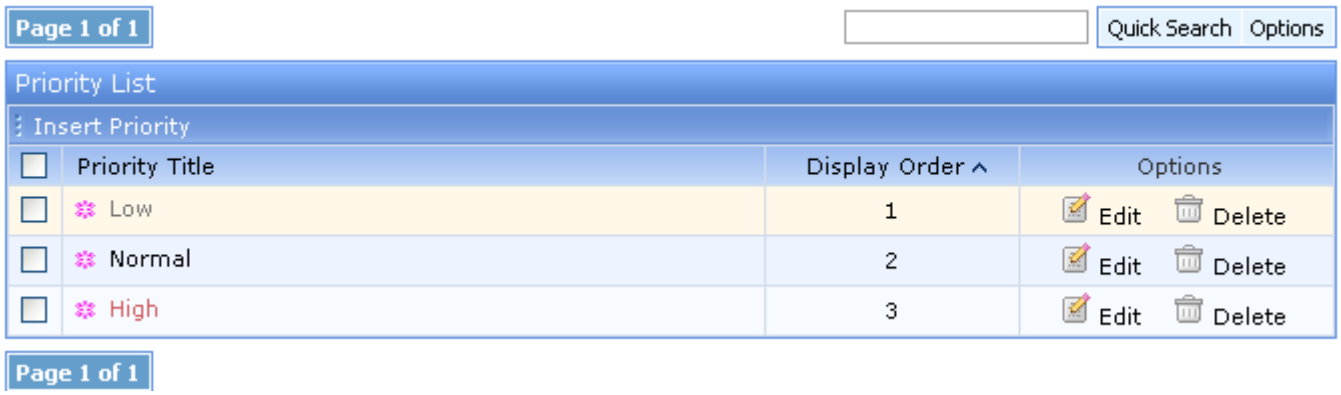


To view and manage priorities:

1. Click on **Manage Priorities** under the Teamwork menu, as shown below.



A list of all of the statuses available for teamwork data types will be listed, as shown below.



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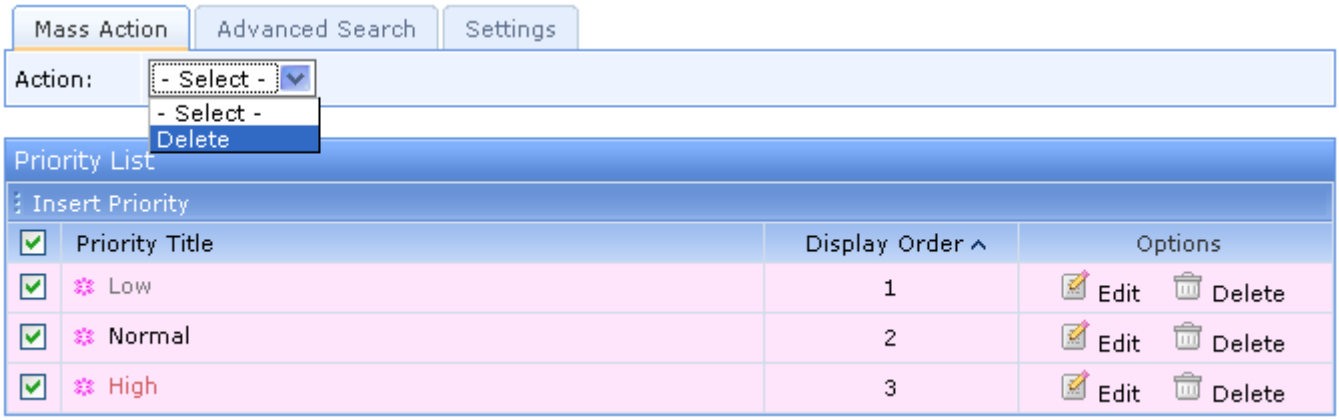
To **delete** a priority, click on the corresponding delete icon.

Selecting multiple priorities (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, priorities can be mass-deleted. Under the **Advanced Search** tab, priorities can be searched for by title. Under the **Settings** tab, the number of priorities shown per page (if there are many) can be limited.



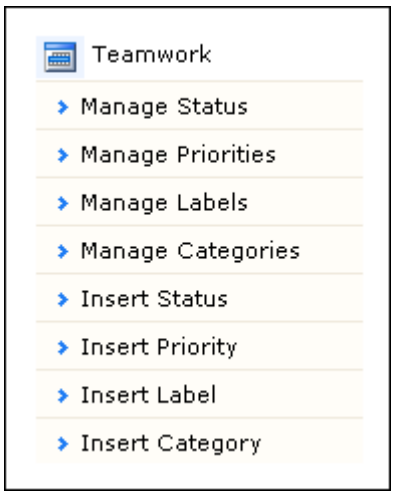
To **edit** a priority, click on the corresponding edit icon. From here you can configure the properties of the selected priority.

Refer to teamwork priority fields for documentation on the required fields for editing a priority.

Creating a new teamwork priority

To create a new teamwork priority:

1. Click on **Insert Priority** under the Teamwork menu, as shown below.



From here you can configure the properties of the new priority. Refer to teamwork priority fields for documentation on the required fields for creating a new priority.

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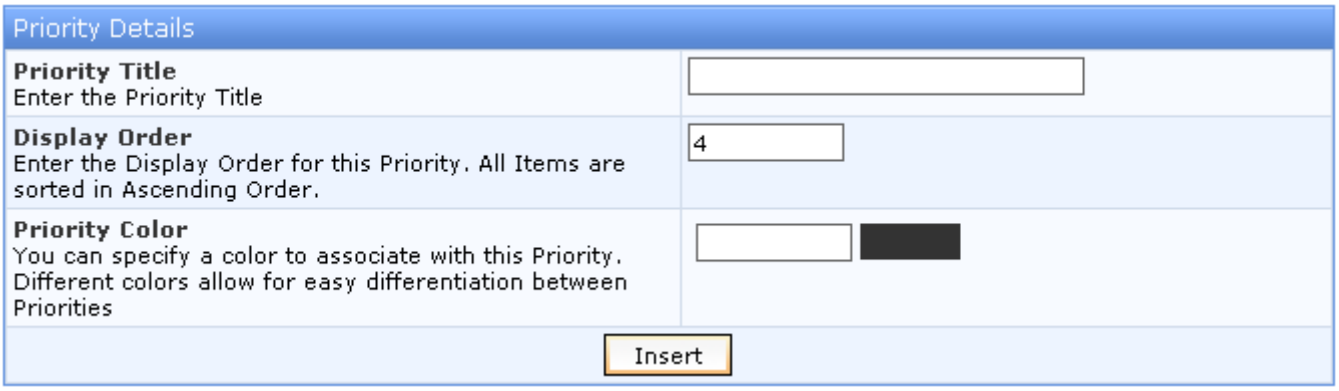
Teamwork priority fields


Priority Details
Priority Title
Enter the Priority Title
Display Order
Enter the Display Order for this Priority. All Items are sorted in Ascending Order.
4
Priority Color
You can specify a color to associate with this Priority. Different colors allow for easy differentiation between Priorities
Insert

- **Priority Title** – a title for this priority.
- **Display Order** – the order by with priorities are displayed in the staff control panel.
- **Priority Color** – a color can be set for the priority. This is used as the text color for whenever this priority is printed in the staff control panel.

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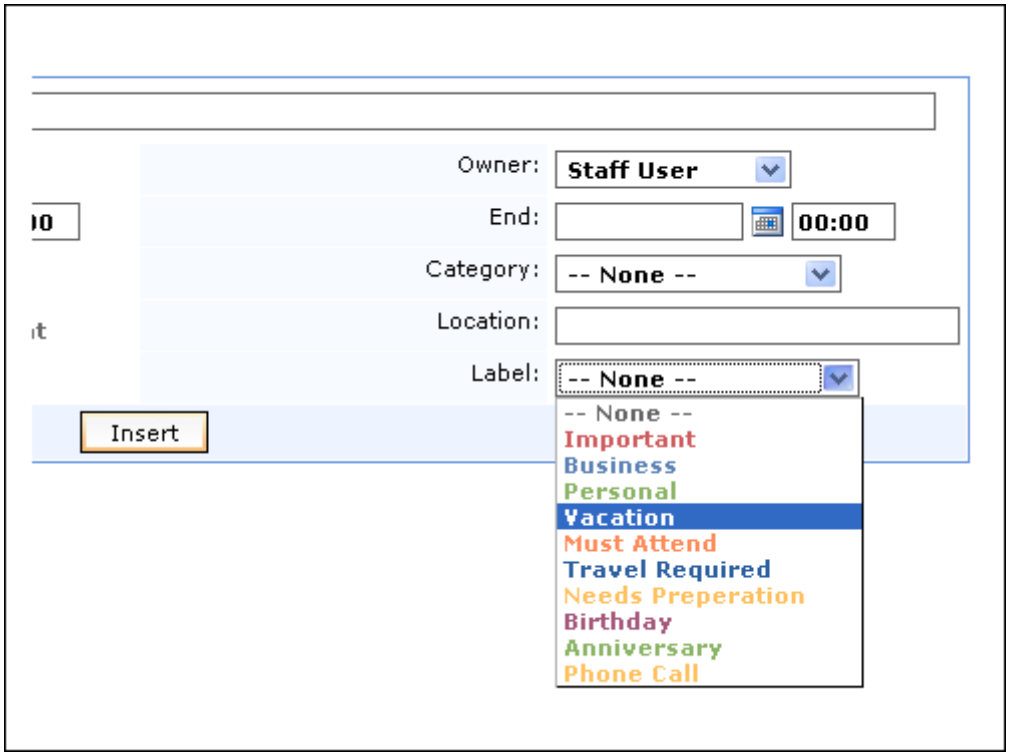
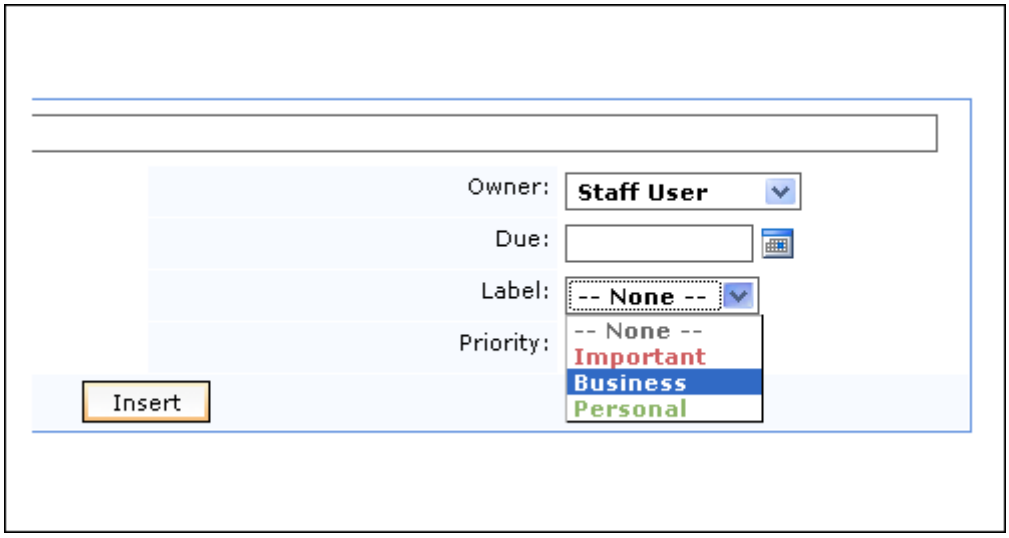
Managing teamwork labels

Labels can be used in a **task** or an **event** (appointment), as shown below.





To view and manage labels:

1. Click on **Manage Labels** under the Teamwork menu, as shown below.

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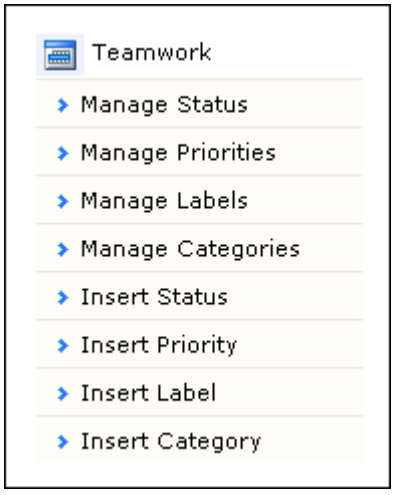

A list of all of the labels available for teamwork data types will be listed, as shown below.

Page 1 of 1
Quick Search
Options
Label List
Insert Label
Label Title
Label Type
Display Order
Options
Important Task 1 Edit Delete
Business Task 2 Edit Delete
Personal Task 3 Edit Delete
Anniversary Event 9 Edit Delete
Birthday Event 8 Edit Delete
Needs Preperation Event 7 Edit Delete
Travel Required Event 6 Edit Delete
Must Attend Event 5 Edit Delete
Vacation Event 4 Edit Delete
Personal Event 3 Edit Delete
Business Event 2 Edit Delete
Important Event 1 Edit Delete
Phone Call Event 10 Edit Delete
Page 1 of 1

To **delete** a label, click on the corresponding delete icon.

Selecting multiple labels (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, labels can be mass-deleted. Under the **Advanced Search** tab, labels can be searched for by title. Under the **Settings** tab, the number of labels shown per page (if there are many) can be limited.

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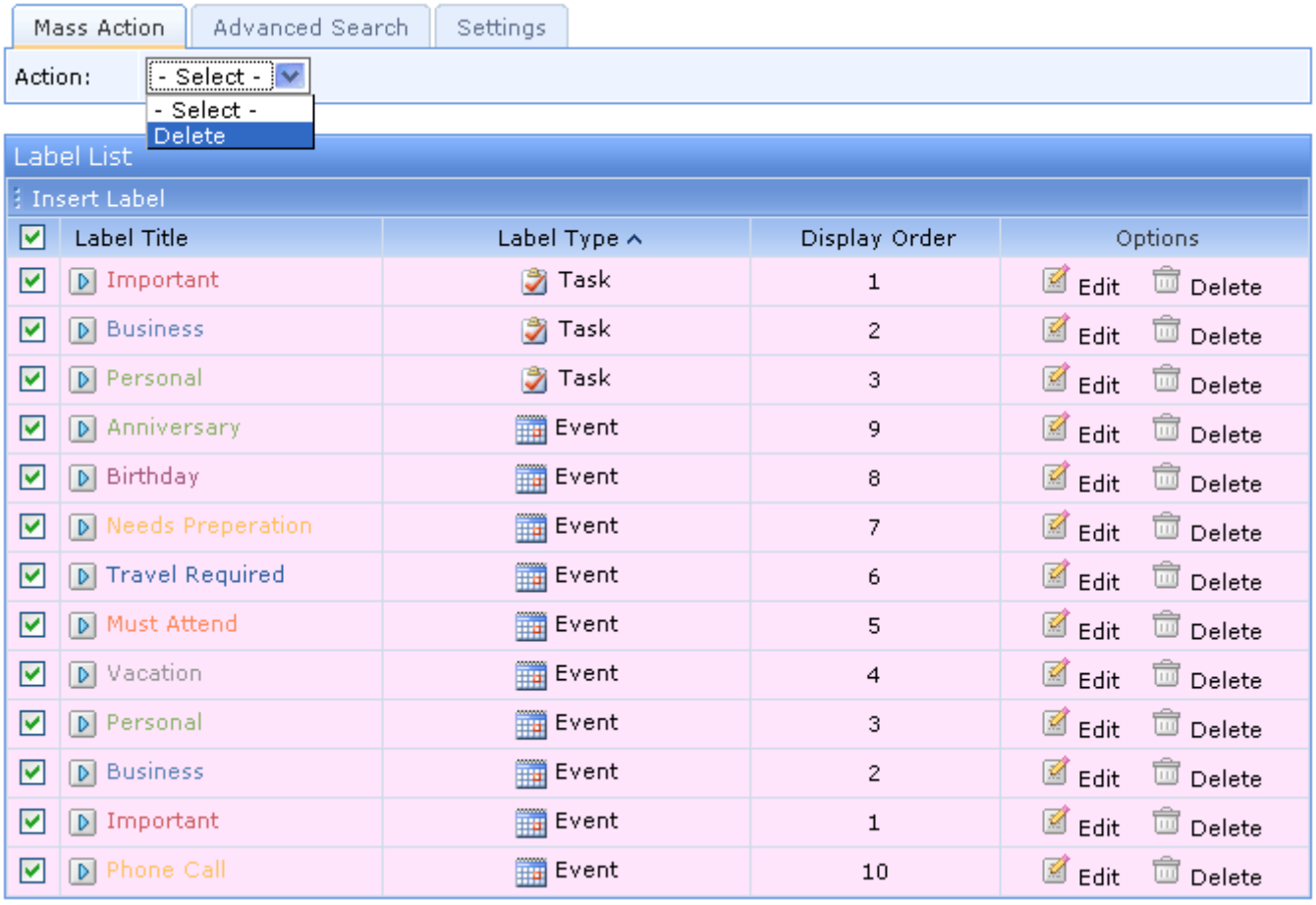


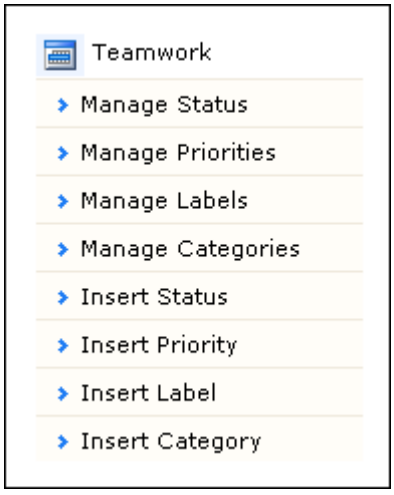
To **edit** a label, click on the corresponding edit icon. From here you can configure the properties of the selected label.

Refer to teamwork label fields for documentation on the required fields for editing a label.

Creating a new teamwork label

To create a new teamwork label:

1. Click on **Insert Label** under the Teamwork menu, as shown below.



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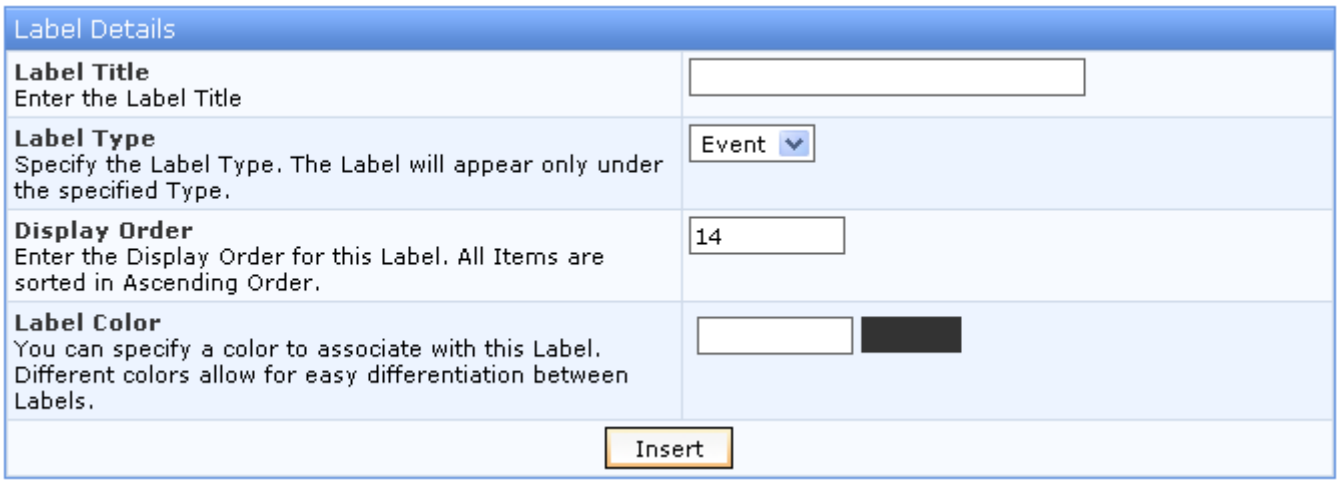
From here you can configure the properties of the new label. Refer to teamwork label fields for documentation on the required fields for creating a new label.

Teamwork label fields


Label Details
Label Title
Enter the Label Title
Label Type
Specify the Label Type. The Label will appear only under the specified Type.
Event
Display Order
Enter the Display Order for this Label. All Items are sorted in Ascending Order.
14
Label Color
You can specify a color to associate with this Label. Different colors allow for easy differentiation between Labels.
Insert

- **Label Title** – a title for this label.
- **Label Type** – for what type of teamwork data item will this label apply to and be available for?
- **Display Order** – the order by with labels are displayed in the staff control panel.
- **Status Color** – a color can be set for the label. This is used as the text color for whenever this label is printed in the staff control panel.

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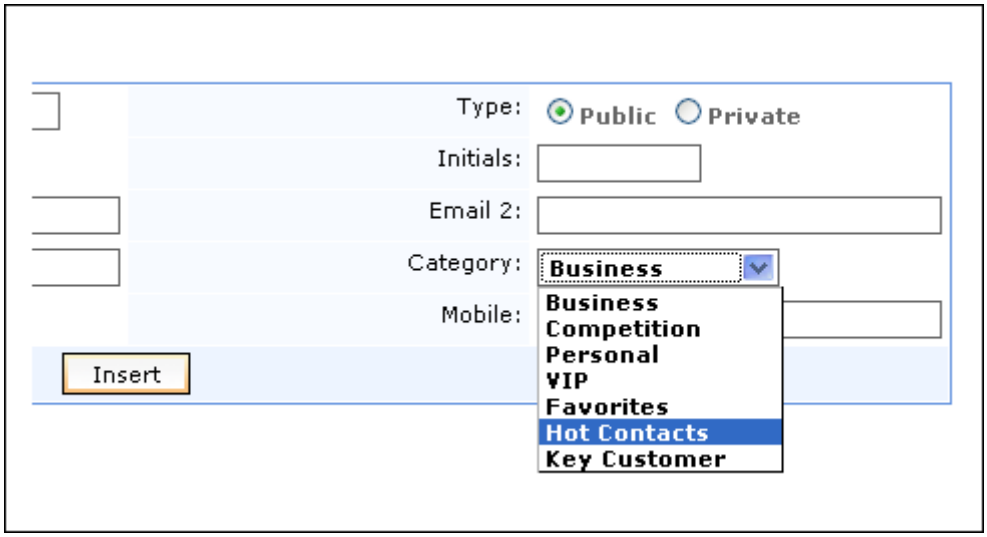
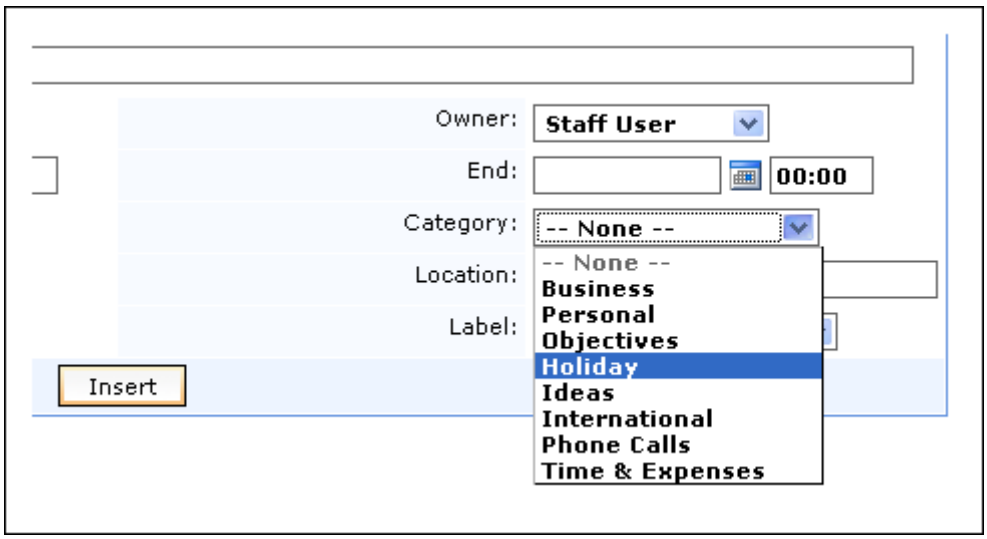
Managing teamwork categories

Categories can be used in **contacts** and **events** (appointments) as shown below.





To view and manage categories:

1. Click on **Manage Categories** under the Teamwork menu, as shown below.

A list of all of the categories available for teamwork data types will be listed, as shown below.

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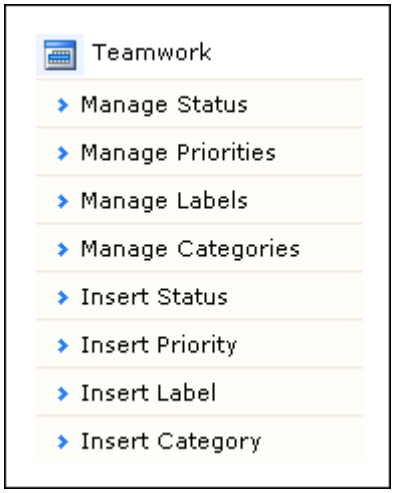
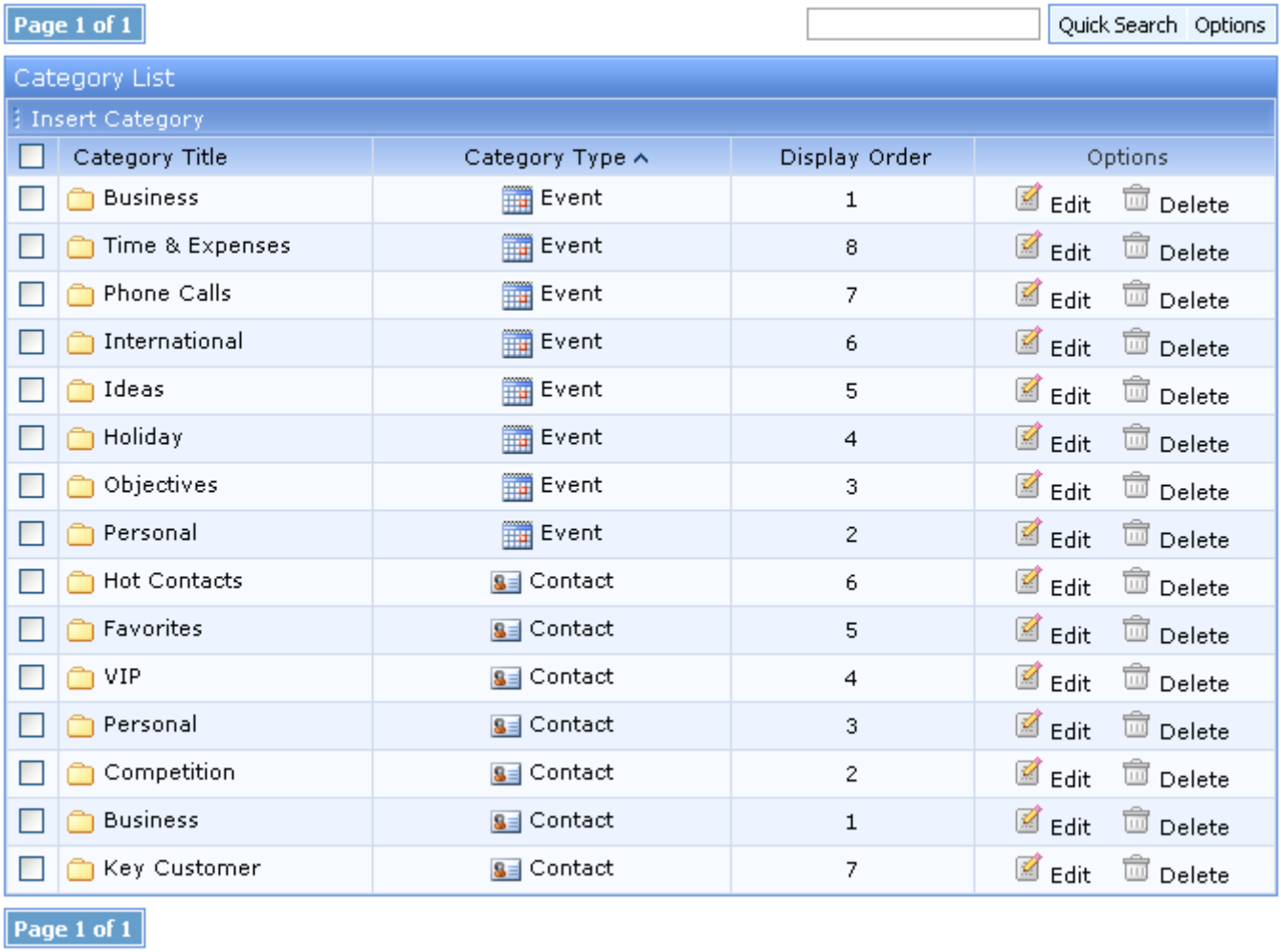


A list of all of the categories available for teamwork data types will be listed, as shown below.


Page 1 of 1
Quick Search
Options
Category List
Insert Category
Category Title
Category Type
Display Order
Options
Business Event 1 Edit Delete
Time & Expenses Event 8 Edit Delete
Phone Calls Event 7 Edit Delete
International Event 6 Edit Delete
Ideas Event 5 Edit Delete
Holiday Event 4 Edit Delete
Objectives Event 3 Edit Delete
Personal Event 2 Edit Delete
Hot Contacts Contact 6 Edit Delete
Favorites Contact 5 Edit Delete
VIP Contact 4 Edit Delete
Personal Contact 3 Edit Delete
Competition Contact 2 Edit Delete
Business Contact 1 Edit Delete
Key Customer Contact 7 Edit Delete
Page 1 of 1

To **delete** a category, click on the corresponding delete icon.

Selecting multiple categories (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, categories can be mass-deleted. Under the **Advanced Search** tab, categories can be searched for by title. Under the **Settings** tab, the number of categories shown per page (if there are many) can be limited.

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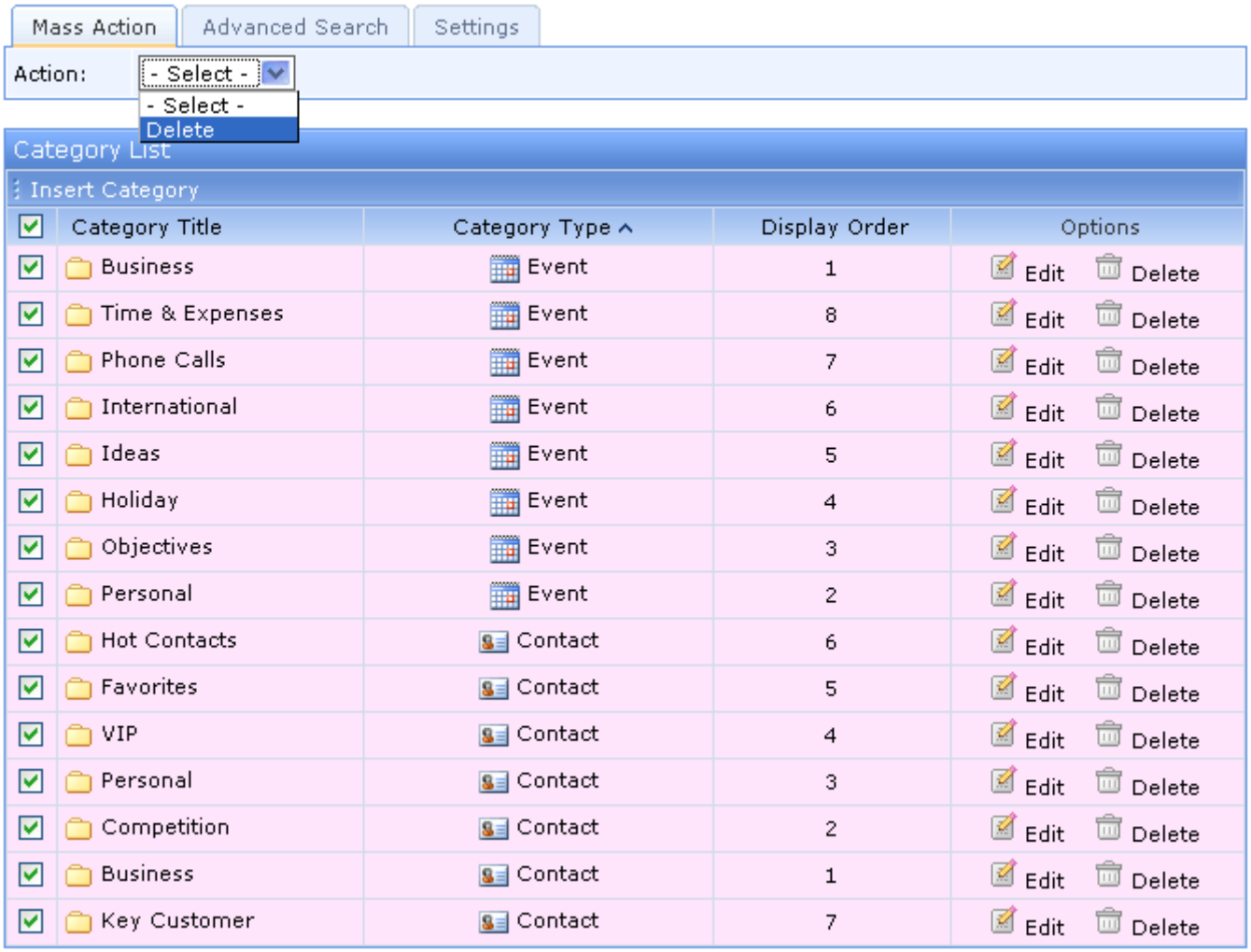

To **edit** a category, click on the corresponding edit icon. From here you can configure the properties of the selected category.

Refer to teamwork category fields for documentation on the required fields for editing a category.

Creating a new teamwork category

To create a new teamwork category:

1. Click on **Insert Category** under the Teamwork menu, as shown below.

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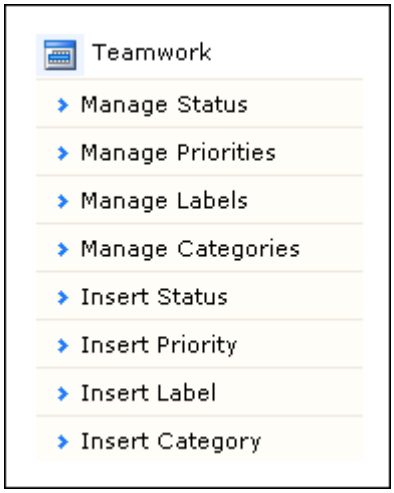
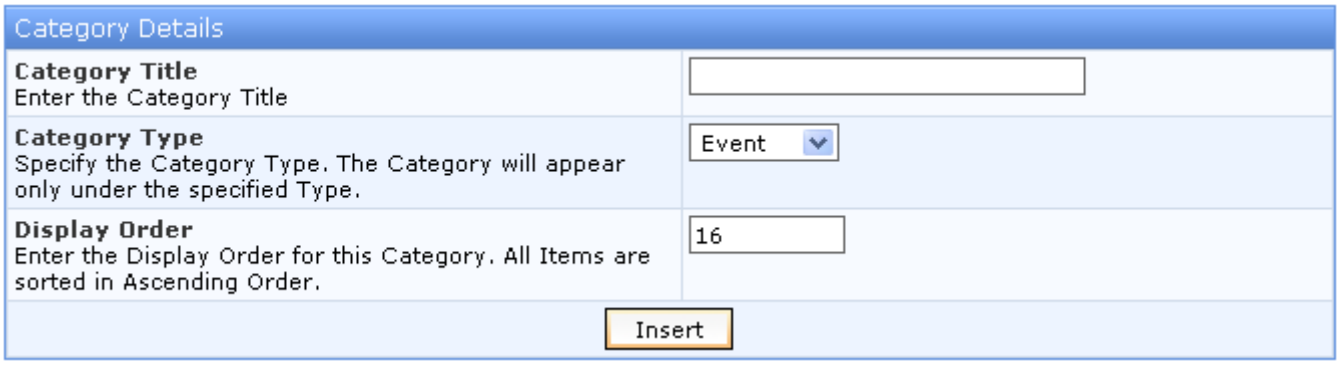


From here you can configure the properties of the new category. Refer to teamwork category fields for documentation on the required fields for creating a new category.

Teamwork category fields


Category Details
Category Title
Enter the Category Title
Category Type
Specify the Category Type. The Category will appear only under the specified Type.
Event
Display Order
Enter the Display Order for this Category. All Items are sorted in Ascending Order.
16
Insert

- **Category Title** – a title for this category.
- **Display Order** – the order by with categories are displayed in the staff control panel.
- **Status Color** – a color can be set for the category. This is used as the text color for whenever this category is printed in the staff control panel.

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Logs

SupportSuite, eSupport and LiveResponse keep certain system logs in the database that date back to a certain amount of time. These logs can be used to review and troubleshoot what is happening in the system internals.

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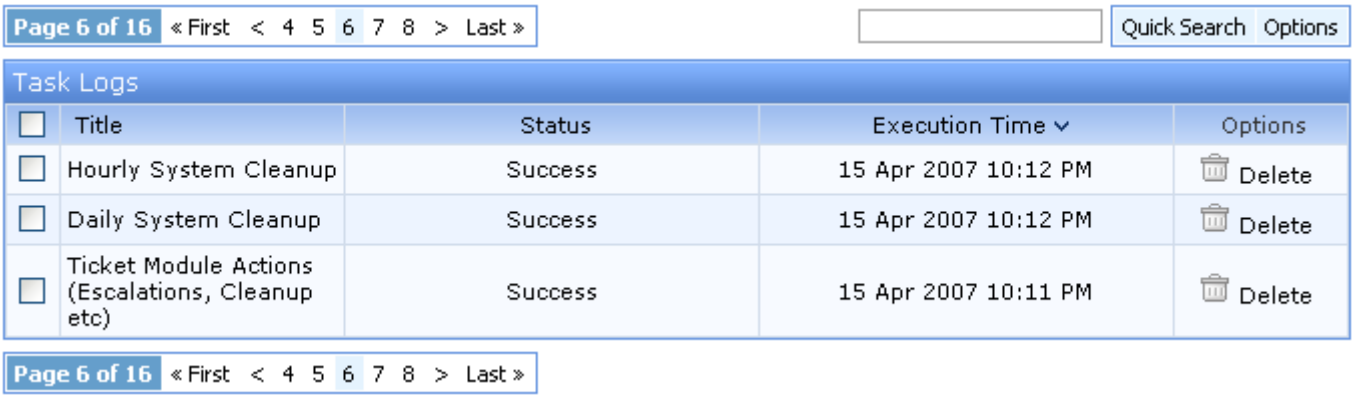
Task log

To view the scheduled tasks log:

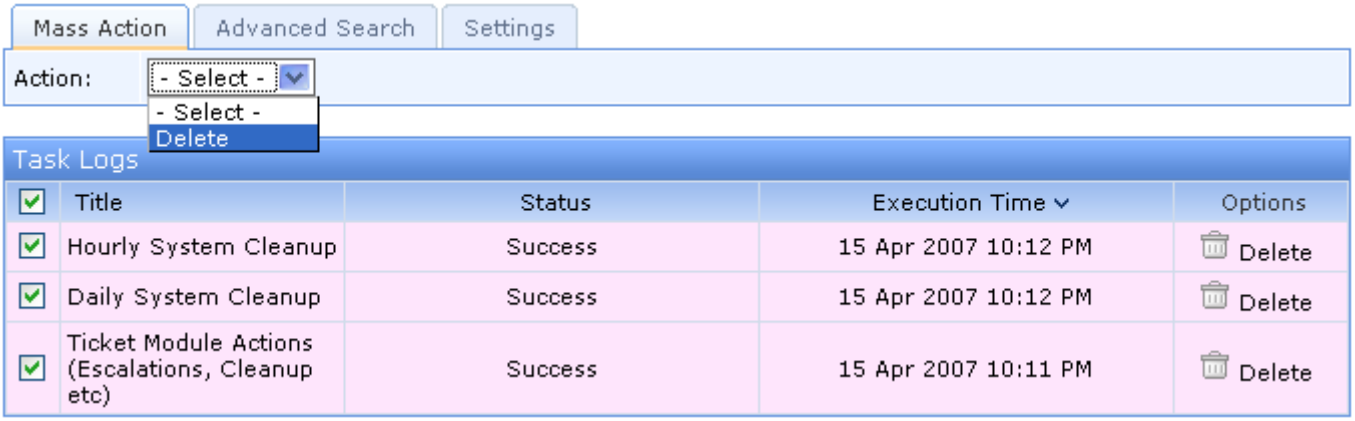
1. Click on **Task Log** under the Logs menu, as shown below.

You will be presented with the log of all executions of scheduled tasks, as shown below.



To **delete** a specific task log entry, click on the corresponding delete icon.

Selecting log entries (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, log entries can be mass-deleted. Under the **Advanced Search** tab, log entries can be searched for by title or by status. Under the **Settings** tab, the number of rules shown per page (if there are many) can be limited.



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Parser Log

To view the mail parser log:

1. Click on **Parser Log** under the Logs menu, as shown below.

How long the parser logs are kept for can be specified in the parser log options (see parser log options).

You will be presented with the logs of all incoming e-mails that have come into the mail parser and their status (a successful parse or a failure (or a drop)).

To **delete** a specific parser log entry, click on the corresponding delete icon.

Selecting log entries (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, log entries can be mass-deleted. Under the **Advanced Search** tab, log entries can be searched for by subject, from e-mail address, to e-mail address and e-mail contents. Under the **Settings** tab, the number of rules shown per page (if there are many) can be limited.

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Parsing may fail because:

- No recipient address was found in the e-mail.
- No e-mail queue matched the recipient address of the incoming e-mail (see mail parser for a more detailed overview of how parsing and queues work).
- The sender's e-mail address is banned (see e-mail bans).

You can review the raw MIME e-mail data of a logged parser entry by clicking on the log entry. This will open a new window listing detailed parsed information and unparsed MIME data, as shown below.

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Parser Log #4181

General Information

Parser Log ID:	4181	Ticket ID:	3367
Ticket Mask ID:	CRX-417669	Date:	15 Apr 2007 02:20 AM
Timeline:	22h50m7s	Email Queue:	test@kayako.com
Process Status:	Success	Subject:	Out of Office Auto Reply
From Email:	test.user@email.com	Destination Email:	test@kayako.com
Size:	0.90 KB	Time Taken:	0.423 Seconds

Result

Created Ticket #CRX-417669

MIME Data

```
From test.user@email.com Sun Apr 15 02:20:22 2007
Received: from mail.server.com ([87.106.00.91])
        by another.mail.server.net with esmtps (TLSv1:AES256-SHA:256)
        (Exim 4.63)
        (envelope-from <test.user@email.com>)
        id 1HctPi-0006Zd-KV
        for test@kayako.com; Sun, 15 Apr 2007 02:20:22 +0100
Received: (qmail 32720 invoked by uid 0); 15 Apr 2007 03:24:33 +0200
Date: 15 Apr 2007 03:24:33 +0200
Message-ID: <20070415012433.32719.qmail@s15217851.another.mail.server.net>
Reply-To: test.user@email.com
From: test.user@email.com
To: test@kayako.com
MIME-Version: 1.0
Subject: Out of Office Auto Reply
Content-Type: text/plain; charset="UTF-8"
Content-Transfer-Encoding: 8bit
Content-Disposition: inline
```

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Scheduled tasks

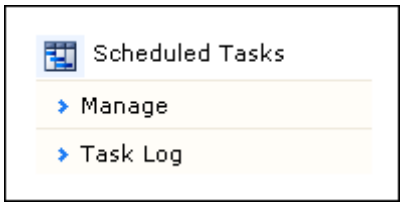
SupportSuite, eSupport and LiveResponse operate an internal cron system which performs things such as POP3/IMAP mail fetching every 10 minutes, system cleanups and follow-up ticket actions.

However, this internal cron system cannot continuously run and execute by itself. In order for the internal cron system to execute, a page in the client support interface or staff control panel must be loaded. For a busy support desk, the risk of the internal cron system going stagnant is low.

However, if your support desk is not busy and you use POP3/IMAP e-mail fetching, it is highly recommended you set up a system-side cron job to frequently load the **/cron/index.php** page in your SupportSuite, eSupport or LiveResponse installation. For more information on creating system-side cron jobs, see setting up cron jobs in the installation guide.

To view and manage scheduled tasks:

1. Click on **Manage** under the Scheduled Tasks menu, as shown below.



A list of all of the installed scheduled tasks and their statuses will be displayed, as shown below.

Task List

Title	Next Run	Last Run	Runs Every	Options
Hourly System Cleanup	16 Apr 2007 01:11 AM	16 Apr 2007 12:33 AM	1 Hour(s)	Run Disable
Daily System Cleanup	16 Apr 2007 04:01 PM	15 Apr 2007 10:12 PM	1 Day(s)	Run Disable
POP3/IMAP Fetching	14 Jan 2007 05:35 PM	14 Jan 2007 05:35 PM	10 Minute(s)	Run Enable
Mail Parser Cleanup	16 Apr 2007 04:01 PM	15 Apr 2007 10:12 PM	1 Day(s)	Run Disable
Ticket Module Actions (Escalations, Cleanup etc)	16 Apr 2007 12:21 AM	15 Apr 2007 11:52 PM	30 Minute(s)	Run Disable
ticketfollowup	16 Apr 2007 12:12 AM	16 Apr 2007 12:02 AM	10 Minute(s)	Run Disable

To forcibly fun a scheduled task (regardless of the task's next run time) click on the run icon. All tasks are enabled by default, except for the **POP3/IMAP Fetching** task.

To enable a task, click on the enable icon. To disable a task, click on the disable icon.

- **Hourly System Cleanup** – performs an hourly cleanup of the system (such as logs).

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- **Daily System Cleanup** – performs a daily cleanup of the system (such as logs). It is recommended to have this task enabled.
- **POP3/IMAP Fetching** – this task cycles through each e-mail queue that has been configured to poll a POP3 or IMAP e-mail box, to import the e-mails and parse them as tickets. For more information, see e-mail queues.
- **Mail Parser Cleanup** – this task cleans up after the mail parser (logs and temporary data stores).
- **Ticket Module Actions** – this task executes ticket escalations.
- **ticketfollowup** – this task processes all of the scheduled follow up actions that have been queued for tickets. For more information, see automatic ticket follow-ups in the staff control panel.

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Tasks log

A guide to the tasks log can be found in the logs section (see logs).

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Database

Through the SupportSuite, eSupport and LiveResponse administrator control panel, basic database operations can be performed (such as optimization and backing up).

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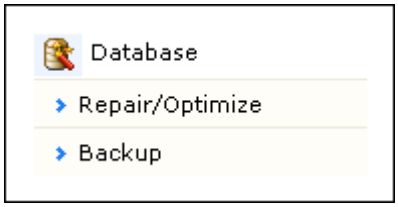
Maintenance (repair and optimize)

To repair or optimize the database tables:

1. Click on **Repair/Optimize** under the Database menu, as shown below.

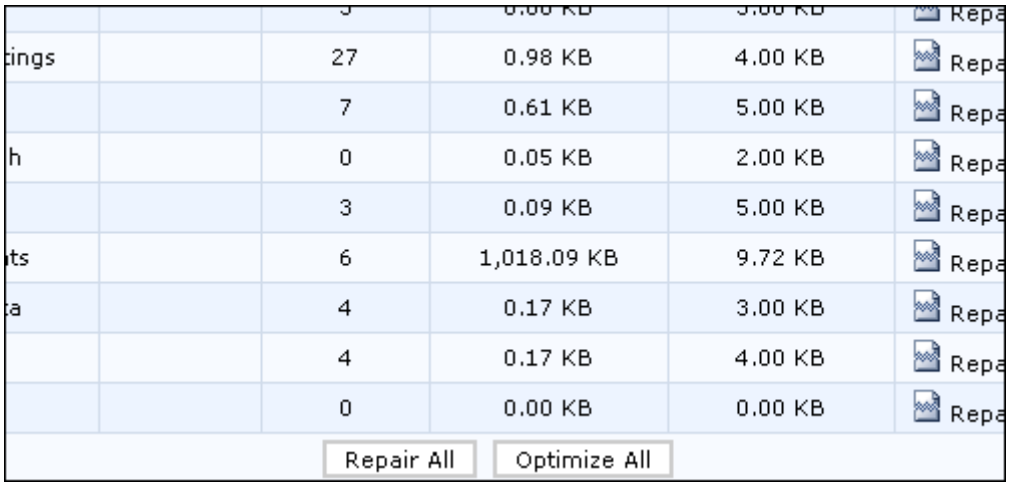


The entire database structure and all of its tables will be listed, including statistical information on each table.

To **repair** a table, click on the corresponding repair icon (see http://dev.mysql.com/doc/refman/5.0/en/repair.html for more information on repairing MySQL tables).

To **optimize** a table, click on the corresponding optimize icon (see http://dev.mysql.com/doc/refman/5.0/en/optimize-table.html for more information on optimizing MySQL tables).

Scroll to the bottom of this page and you will see two buttons – **Repair All** and **Optimize All**, as shown below. Clicking either will perform the respective action on all of the tables.



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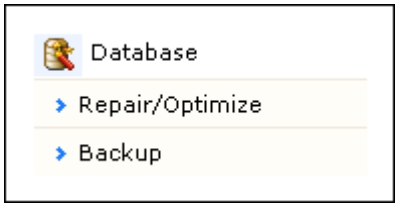
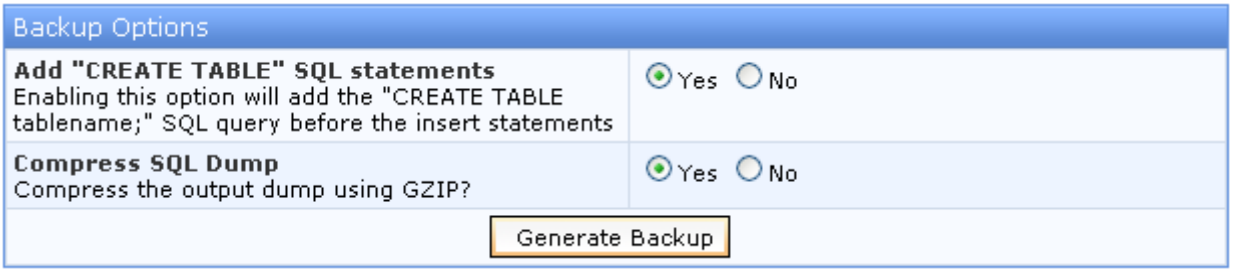
Backup (database dump)

To download a MySQL dump file of the SupportSuite, eSupport or LiveResponse database:

1. Click on **Backup** under the Database menu, as shown below.





- **Add "CREATE TABLE" SQL statements** – if enabled, the table schema will also be backed up in the database backup file.
- **Compress SQL Dump** – if enabled, the database backup file will be compressed before being sent to your web browser.

This procedure may not be successful if your database size is big very large, as the script will time out before the back up file is generated.

If you have a particularly large database, backing up and downloading this way may not be a viable or reliable option. In such a case, it is recommended that you take a MySQL backup either via your control panel software (such as cPanel or Plesk Control Panel), phpMyAdmin or via command prompt.

To take a MySQL database dump (backup file) via the MySQL CLI command prompt, use the following command:

- mysqldump --opt -Q -u *dbusername* -p *databasename* > */path/to/backupname.sql*

If your MySQL server is hosted externally, you can use this command to connect to it and take a backup dump:

- mysqldump --opt -Q -h *hostname* -u *dbusername* -p *databasename* > */path/to/backupname.sql*

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Diagnostics

The sections belonging to the diagnostics area of the administrator control panel provide access to useful server and installation information that will help you and support staff debug and troubleshoot issues that you may have.

Most of the diagnostic information here is generated by your server. Thus, some areas of the diagnostic tools may be brief in documentation as they are out of the scope of this user manual.

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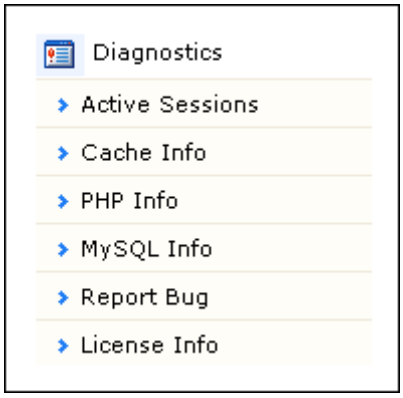
Active sessions

To view the user sessions currently active within the system:

1. Click on **Active Sessions** under the Diagnostics menu, as shown below.



A list of the current users logged into or browsing an area of your support desk will be listed, as shown below.

Session List

IP Address	Last Activity	Session Type	User Agent	Options
85.211.138.50	0s	Admin	Mozilla/5.0 (Windows; U; Windows NT 5.1; en-GB; rv:1.8.1.3)	Kill Session
69.117.30.52	0s	Client	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1; .NET	Kill Session
69.117.30.52	2s	Visitor	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1; .NET	Kill Session
74.111.63.126	24s	Visitor	Mozilla/5.0 (Windows; U; Windows NT 5.1; en-US; rv:1.8.0.11)	Kill Session
74.111.63.126	28s	Client	Mozilla/5.0 (Windows; U; Windows NT 5.1; en-US; rv:1.8.0.11)	Kill Session

You are also able to **kill** a session, by clicking on the corresponding kill ✖ icon. If you kill a user who is active in an **admin** session (is logged into the administrator control panel), the user will be logged out and will have to log in again.

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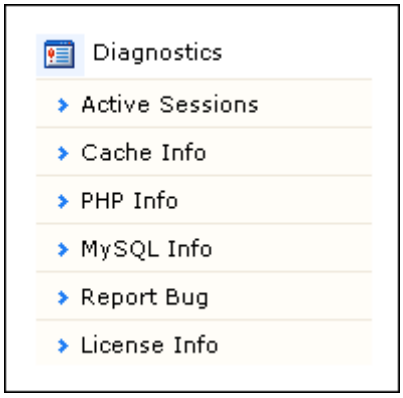
Cache info

Most templates are cached in the database, to save them being generated every time a page is requested.

To view the system's cache:

1. Click on **Cache Info** under the Diagnostics menu, as shown below.



A list of all cached templates and the size of each cache will be listed, as shown below.

Cache Info

Cache Title	Size	Options
staffcache	0.44 KB	View
staffgroupcache	2.24 KB	View
departmentcache	0.59 KB	View
groupassigncache	0.08 KB	View
staffassigncache	0.10 KB	View
queuecache	0.85 KB	View
breaklinecache	0.18 KB	View
calendarstatuscache	1.76 KB	View
calendarprioritycache	0.60 KB	View
calendarlabelcache	2.53 KB	View
calendarcategorycache	2.48 KB	View
statuscache	1.05 KB	View
prioritycache	1.16 KB	View
attachmenttypescache	0.06 KB	View

The contents of a cached item can be viewed by clicking on the corresponding **View** link.

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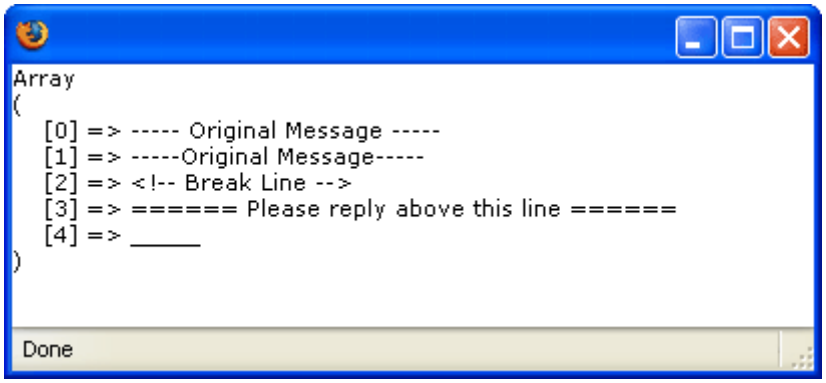

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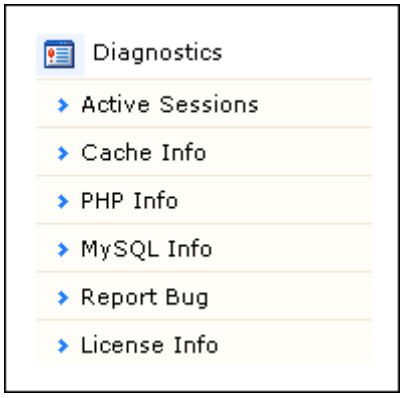
PHP info

PHP's phpinfo() command will be executed when viewing the PHP info (see www.php.net/phpinfo for more information).

To view the system's PHP info page:

1. Click on **PHP Info** under the Diagnostics menu, as shown below.



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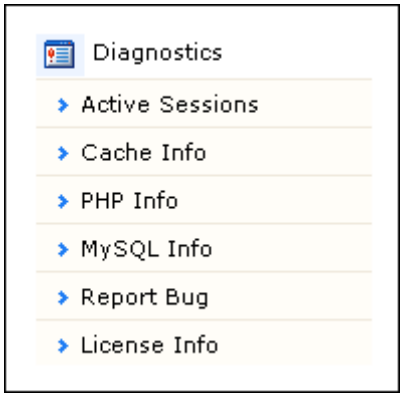
MySQL info

The server's MySQL settings, configurations and variables are listed here.. The value of these variables is defined in the **my.cnf** file which is normally located in (in Unix or Linux) the **etc** folder.

To view the system's MySQL info page:

1. Click on **MySQL Info** under the Diagnostics menu, as shown below.



MySQL Info	
Variable	Value
back_log	50
basedir	/
binlog_cache_size	32768
bulk_insert_buffer_size	8388608
character_set_client	latin1
character_set_connection	latin1
character_set_database	latin1
character_set_results	latin1
character_set_server	latin1
character_set_system	utf8
character_sets_dir	/usr/share/mysql/charsets/
collation_connection	latin1_swedish_ci
collation_database	latin1_swedish_ci
collation_server	latin1_swedish_ci
concurrent_insert	ON
connect_timeout	10

For more information on configuring MySQL, see http://dev.mysql.com/doc/refman/5.0/en/configure-options.html.

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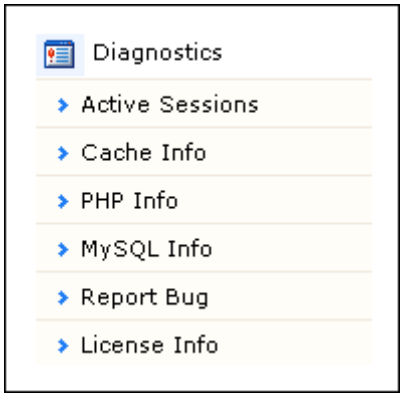
Report bug

To submit a bug report to Kayako, please visit http://bugs.kayako.net.

Although still present, submitting a bug using this form is **no longer encouraged**. Instead, please copy and paste the system information into a bug report at this location: http://bugs.kayako.net.

1. Click on **Report Bug** under the Diagnostics menu, as shown below.



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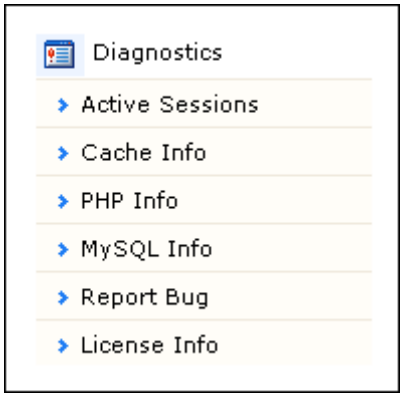
License info

To view your SupportSuite, eSupport or LiveResponse license information:

1. Click on **License Info** under the Diagnostics menu, as shown below.



Your license file's information will be displayed, as shown below.

License Information	
Created On:	05 Jan 2007 09:30 PM
Expiry:	04 Jul 2007 01:00 AM
Full Name	Jamie Edwards
Unique ID:	B64E021126C832BB29EC
Product:	supportsuite
Registered Domains	
Domain #1	kayako.com

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Mobile staff control panel interfaces

Kayako SupportSuite, eSupport and LiveResponse come with web based interfaces that have been designed specifically for use on a PDA (i.e. a Pocket PC) and a WAP enabled mobile phone.

The interfaces can be accessed at the following locations:

- PDA
    - www.*yourdomain*.com/*pathtoyourinstallation*/pda
- WAP
    - www.*yourdomain*.com/*pathtoyourinstallation*/wap

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PDA staff control panel interface

To log into the PDA interface:

1. Browse to www.*yourdomain*.com/*pathtoyourinstallation*/pda
2. Log in using your staff username and password

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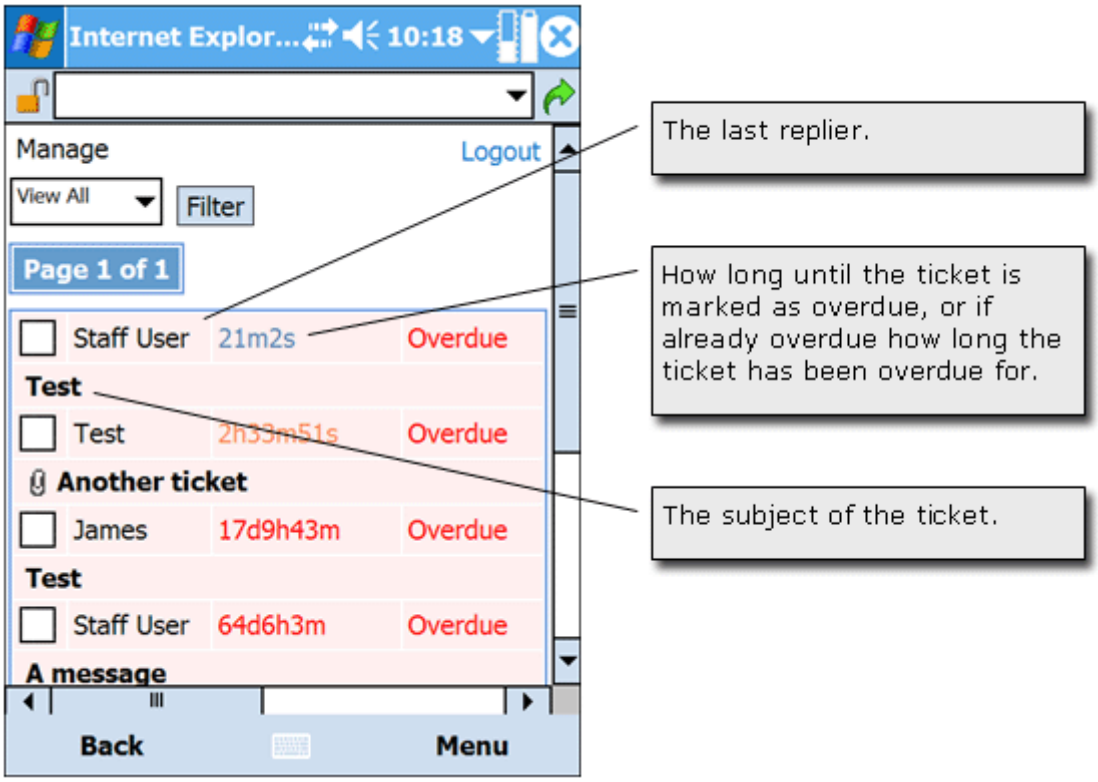
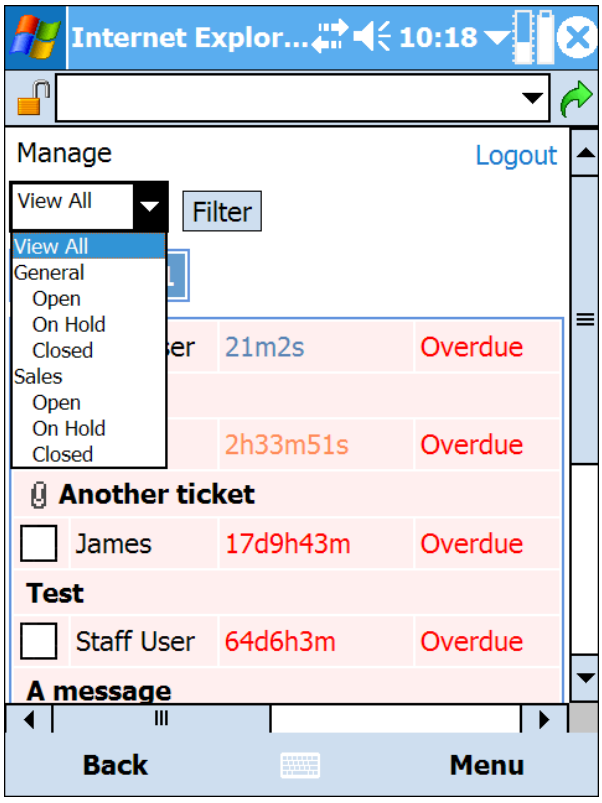
Ticket listing



The tickets can also be filtered by department and by status, as shown below.



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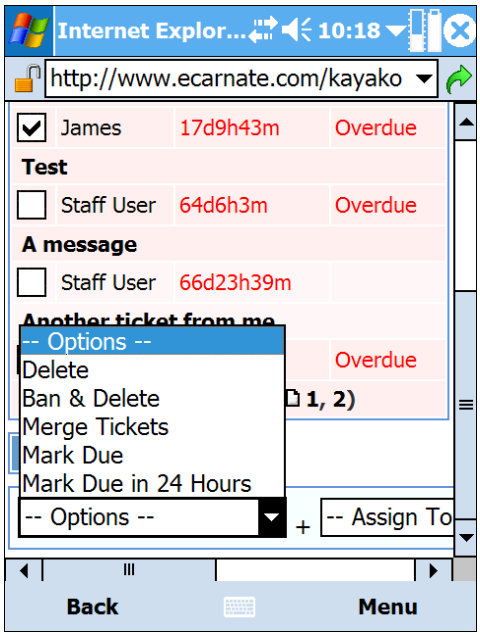
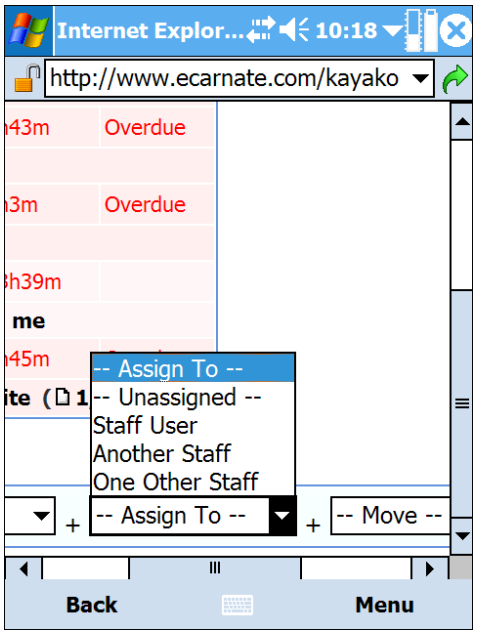
Managing tickets

Multiple tickets can be selected by checking the corresponding check boxes (as shown below). Scroll to the bottom of the ticket listing for a series of action menus, as shown below.





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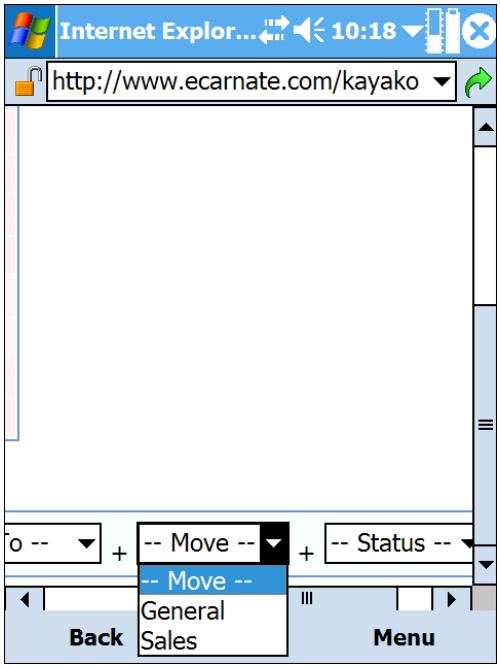

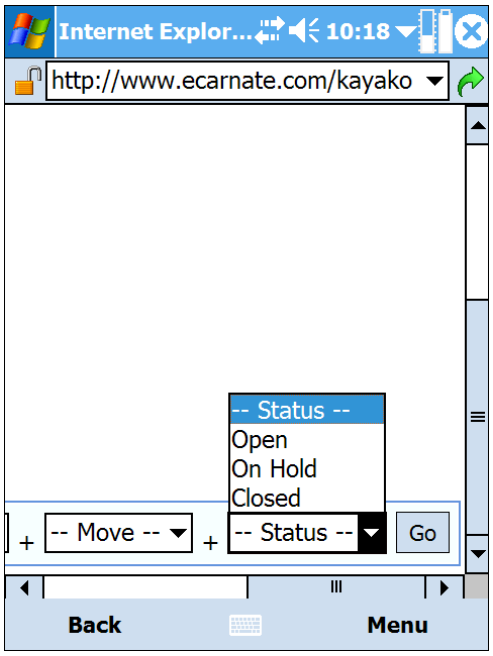

For more information on the respective actions:

- Ticket assignments.
- Ticket statuses.

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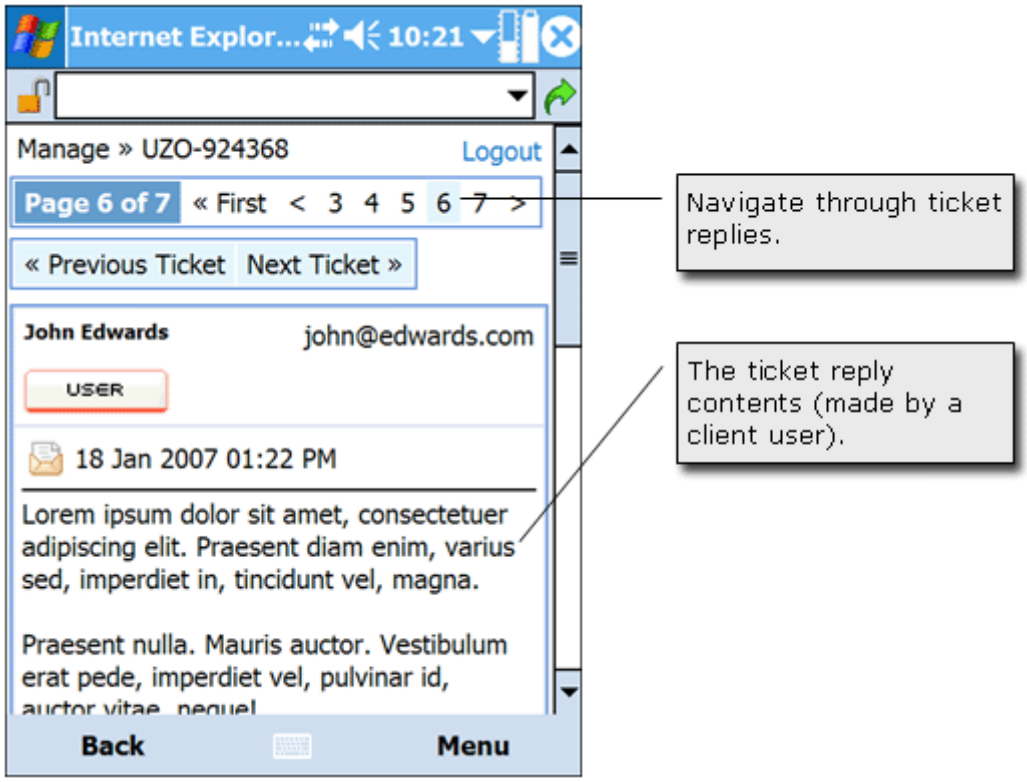
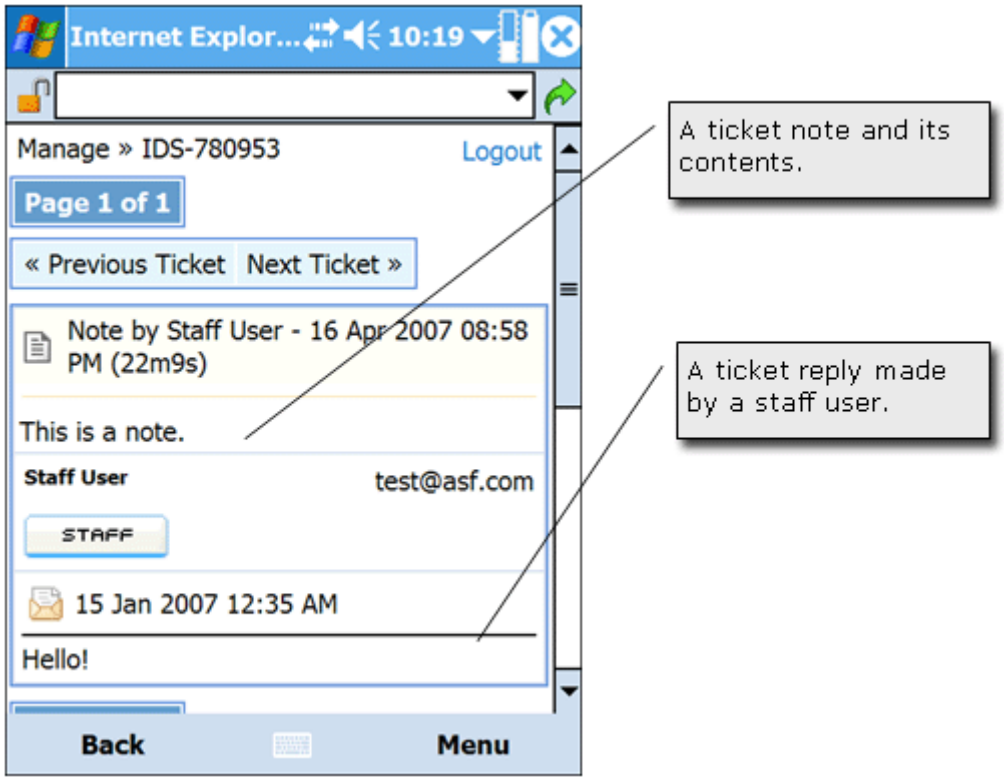
Viewing a ticket


Internet Explor... 10:21
Manage » UZO-924368
Logout
Page 6 of 7
« First < 3 4 5 6 7 >
« Previous Ticket
Next Ticket »
John Edwards
john@edwards.com
USER
18 Jan 2007 01:22 PM
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Praesent diam enim, varius sed, imperdiet in, tincidunt vel, magna.
Praesent nulla. Mauris auctor. Vestibulum erat pede, imperdiet vel, pulvinar id,
Back
Menu
Navigate through ticket replies.
The ticket reply contents (made by a client user).



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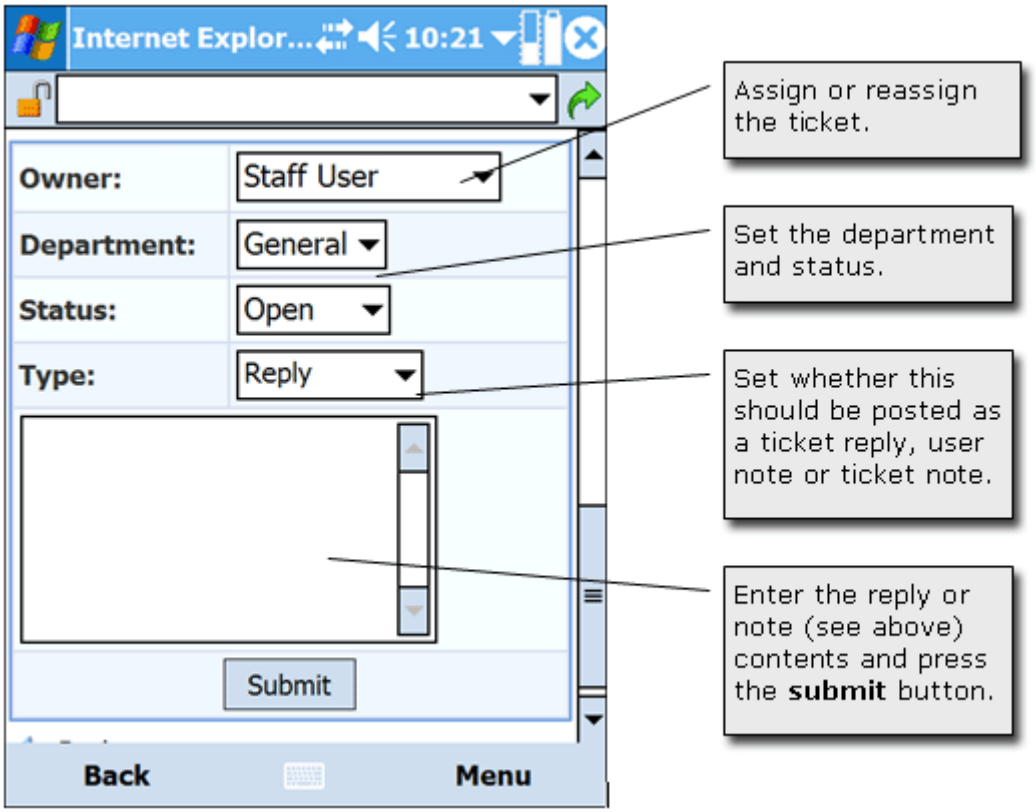
Replying to a ticket

When viewing a ticket (see viewing a ticket), scroll to the bottom of the view pane to reach the reply interface.



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Kayako SMS gateway

The Kayako SMS Gateway is an automated web based SMS messaging service powered by Clickatell (www.clickatell.com).

The system allows you to purchase SMS credits within your customer area and seamlessly integrate your SupportSuite, eSupport or LiveResponse installation, allowing your installation to use your SMS credits to send specified alerts to staff users world-wide.

Before you can use SMS alerts in your system, you must first follow these steps:

1. Purchase SMS credits (see buying credits).
2. Enable the Kayako SMS Gateway on your system (see SMS Gateway).
3. Enter your mobile (cellular) phone number under your staff preferences (see staff user preferences).
4. Set up some ticket alert rules that will send out an SMS message to one or multiple staff users (see ticket alerts).

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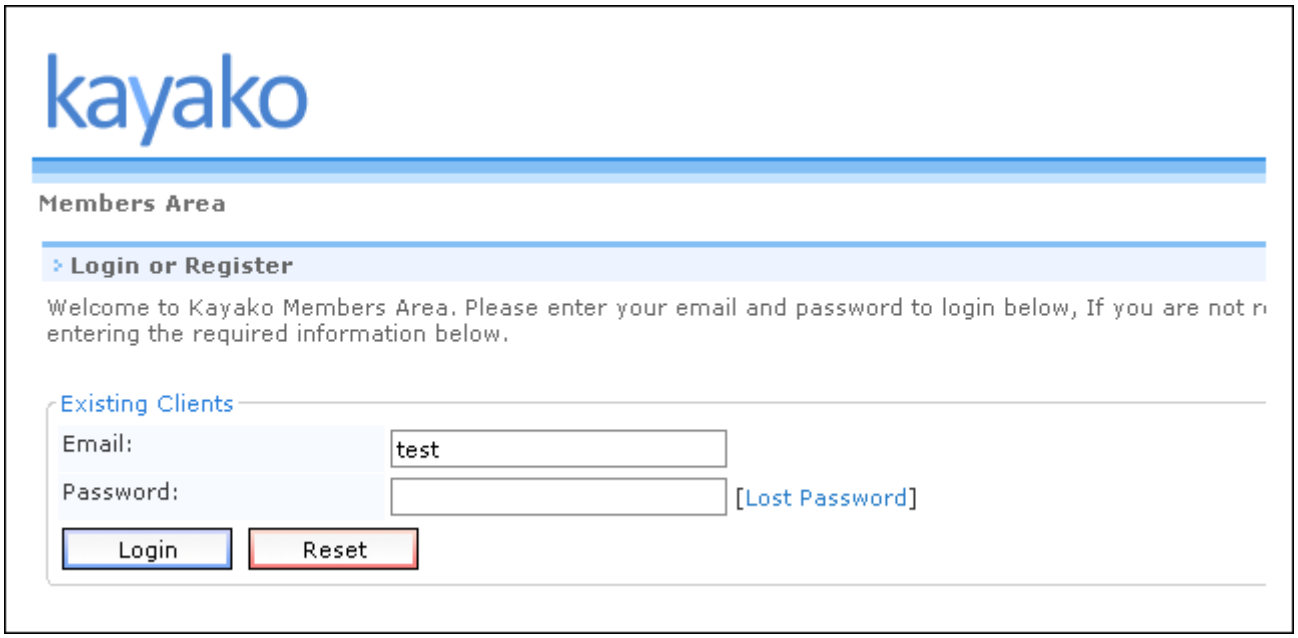
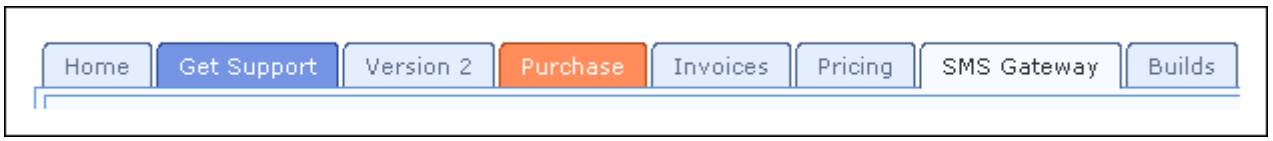
Buying credits

To buy SMS credits:

1. Login to your Kayako customer area at http://members.kayako.net



2. Click on the **SMS Gateway** tab, as shown below.



3. From here, you have the options to purchase **100** credits or **250** credits.
4. Your credits are activated as soon as you have completed the purchase.

For coverage information, click on the **Coverage** tab (towards the bottom of the page). To review a history of the SMS messages sent out from your customer account, click on the **History** tab.

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Frequently asked questions

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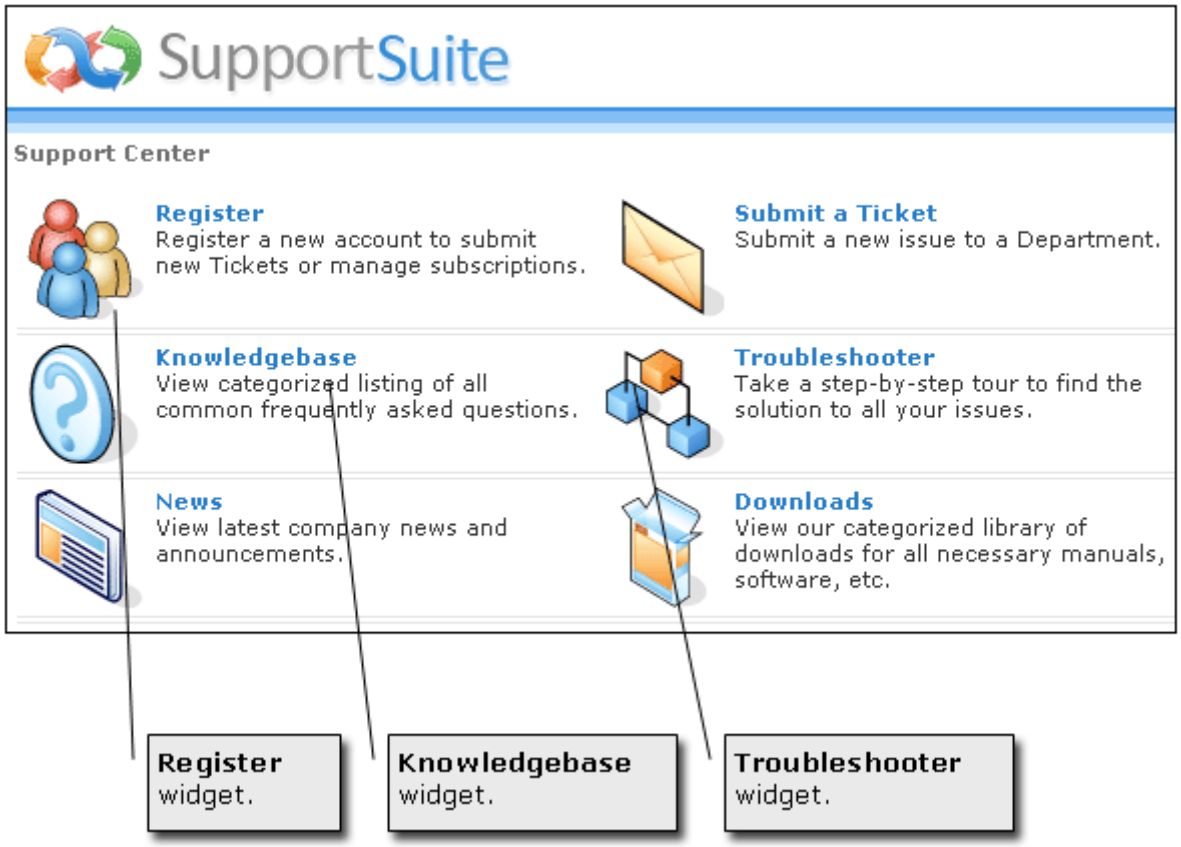
What is a widget?

A **widget** is a component that resides on the main client support interface, as shown below.


SupportSuite
Support Center
Register
Register a new account to submit new Tickets or manage subscriptions.
Submit a Ticket
Submit a new issue to a Department.
Knowledgebase
View categorized listing of all common frequently asked questions.
Troubleshooter
Take a step-by-step tour to find the solution to all your issues.
News
View latest company news and announcements.
Downloads
View our categorized library of downloads for all necessary manuals, software, etc.
Register widget.
Knowledgebase widget.
Troubleshooter widget.

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What is Zend Optimizer and IonCube?

Zend Optimizer is a platform installed on a server which is required to decode and run **Zend Encoded** PHP files. IonCube is similar to Zend Encoder in that its purpose is to encode PHP files.

For more information on both Zend and IonCube encoded files, see Zend or IonCube? in the installation guide.

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How do I disable comments in the client support interface?

This guide was kindly contributed by a community member on the community forums (http://forums.kayako.com/showthread.php?t=11081).

In the current version of SupportSuite, eSupport and LiveResponse, it is not possible to completely disable the posting of comments via the client support interface. This may lead to a lot of automated spam messages entering your moderation queue and filling your database.

To remove the comment posting feature from the client support interface completely:

1. In the administrator control panel, go to **Templates > Search Templates**.
2. Search for the string:
    a. comments
3. This should return the following templates:
    a. **comments**
    b. **kbarticlenavbar**
    c. **kbarticleview**
4. To disable the showing of the comments option in the main Knowledgebase article view, edit **kbarticleview**, removing this line near the bottom of the template:
    a. <{displaytemplate name="comments"}>
5. To disable the comment option under "Article options" in the right hand menu, edit **kbarticlenavbar**, place comments around (or remove) the following (comments are < ! -- and -- > (spaces added):
    a. <img src="<{$themepath}>icon_addcomment.gif" width="16" height="16"> <{$language[addcomment]}>
6. To prevent direct submission of comments, edit the **comments** template, changing or removing the following form action from the top of the template:
    a. "<{$basepath}>"
7. Make sure you include at least an empty pair of quotes "" for the action, and direct submissions should go nowhere.
8. Editing the **comments** template as described above removes all abilities to post comments (directly or indirectly), so use with caution.
9. To edit out the other areas (news and downloads), just see the various other templates listed above and edit accordingly.

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Support resources

If you would like to send in a suggestion or report any errors in this manual, please send an e-mail to docs@kayako.com or post in the documentation forum - your input is very much appreciated. Please do **not** use this address for support.

You can obtain further support for any of Kayako's products via:

- **Support desk** – www.kayako.com/support
- **Community forums** – http://forums.kayako.com

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